PCOLS 101

INTERACTIVE TUTORIAL

Recommended Roles: A/OPC (All Users)

How to Generate Reports in PCOLS Reporting

START

TUTORIAL ICON LEGEND:

HOME/BACK: This icon will take you back to the List of Actions or back one action

NEXT: This icon will allow you to continue to the next action

REPLAY: This icon will allow you to replay the action

EMAIL: This icon will take you to the email message

SCROLL: This icon will allow you to scroll down

INFO: This icon will take you to additional information

The button will appear on many screens throughout this tutorial. Click on this button to view additional information.

Click the button to return to the previous screen.

Clicking on an area highlighted by a red box will advance the tutorial to the next step.

Available Reports

A/BO Report
Account Status Report
Case Disposition Detail Report
Case Disposition Summary Report
Conflict of Interest Report
Infraction Detail Report
Managing Account Review Report
Program Management Report
Provisioning Status Report
Purchase Card Report
Recommended Action Summary Report
Training Due Report
Workflow Aging Report

PCOLS Reporting Users

Reports	Resource Manager	PCPMO Representative	Acquisition Executive Agent	HCA Agent	High-Level A/OPC Supervisor	A/OPC Supervisor	A/OPC	A/BO Supervisor	A/BO	Cardholders Supervisor
Account Status		x	x	x	x	x	x			
Annual Review of Managing Accounts		x	x	x	x	x	x			
Approving/Billing Official		x	x	x	x	x	x	x		
Case Disposition Detail		x	x	x	x	x	x			
Case Disposition Summary		x	x	x	x	x	x			
Conflict of Interest		x	x	x	x	x	x	x		
Infraction Detail		x	x	x	x	x	x			
Program Management		x	x	x	x	x	x			
Provisioning Status		x	x	x	x	x	x			
Purchase Card	x	x	x	x	x	x	x	x	x	x
Recommended Action Summary		x	x	x	x	x	x			
Training Due		x	x	x	x	x	x	x		x
Workflow Aging		x	x	x	x	x	x			

System Information

- The PCOLS reporting database will be updated daily during the **2:00 AM to 5:00 AM ET** system unavailability window, therefore, current data will not be available until the next business day.

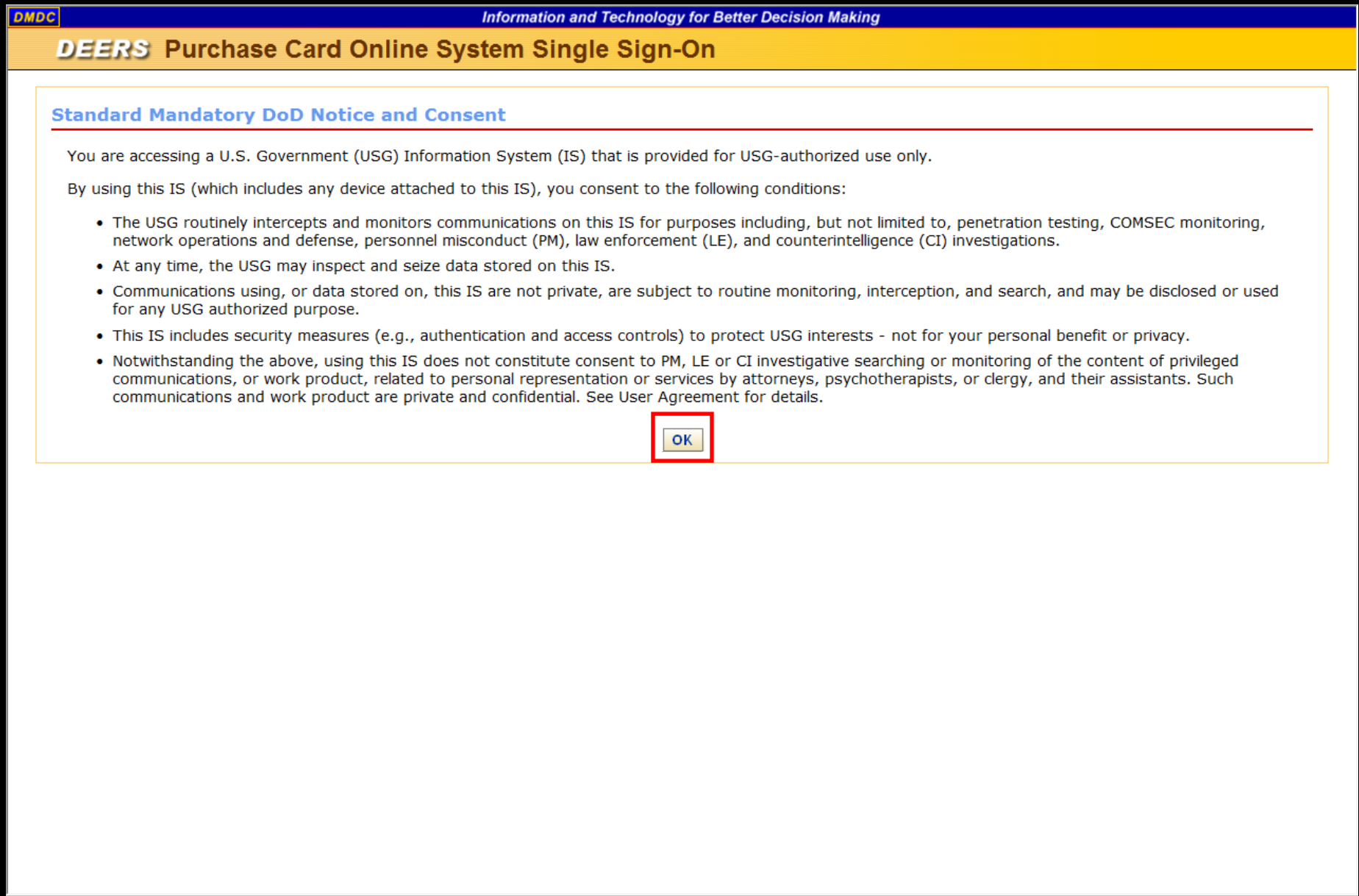
- Reports that contain information from Date Mining Risk Assessment (DM/RA) are only updated at the end of each billing cycle

Logging in

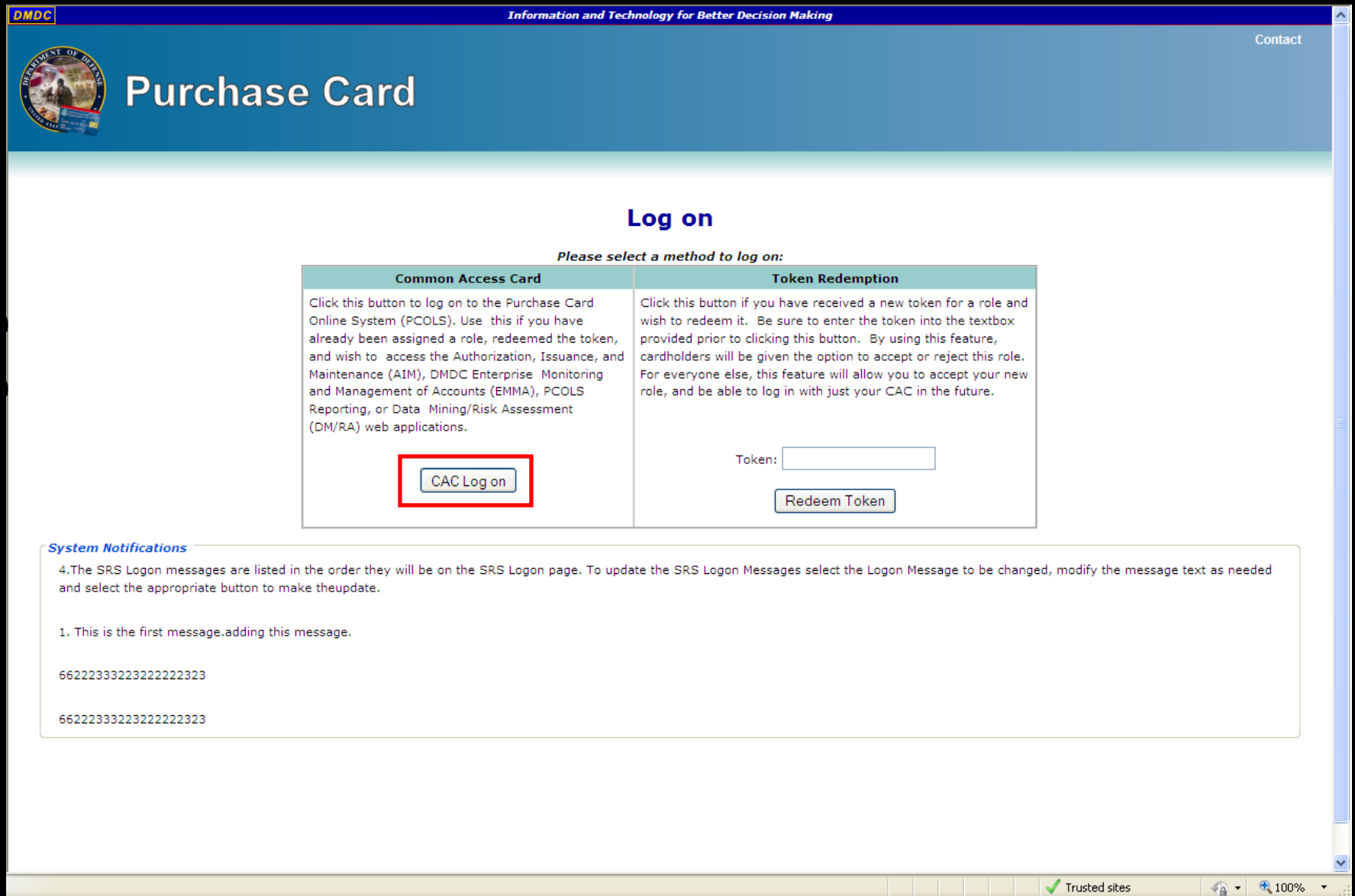
Go to the PCOLS Single Sign-on (SRS):

https://pki.dmdc.osd.mil/appj/pcols-web/

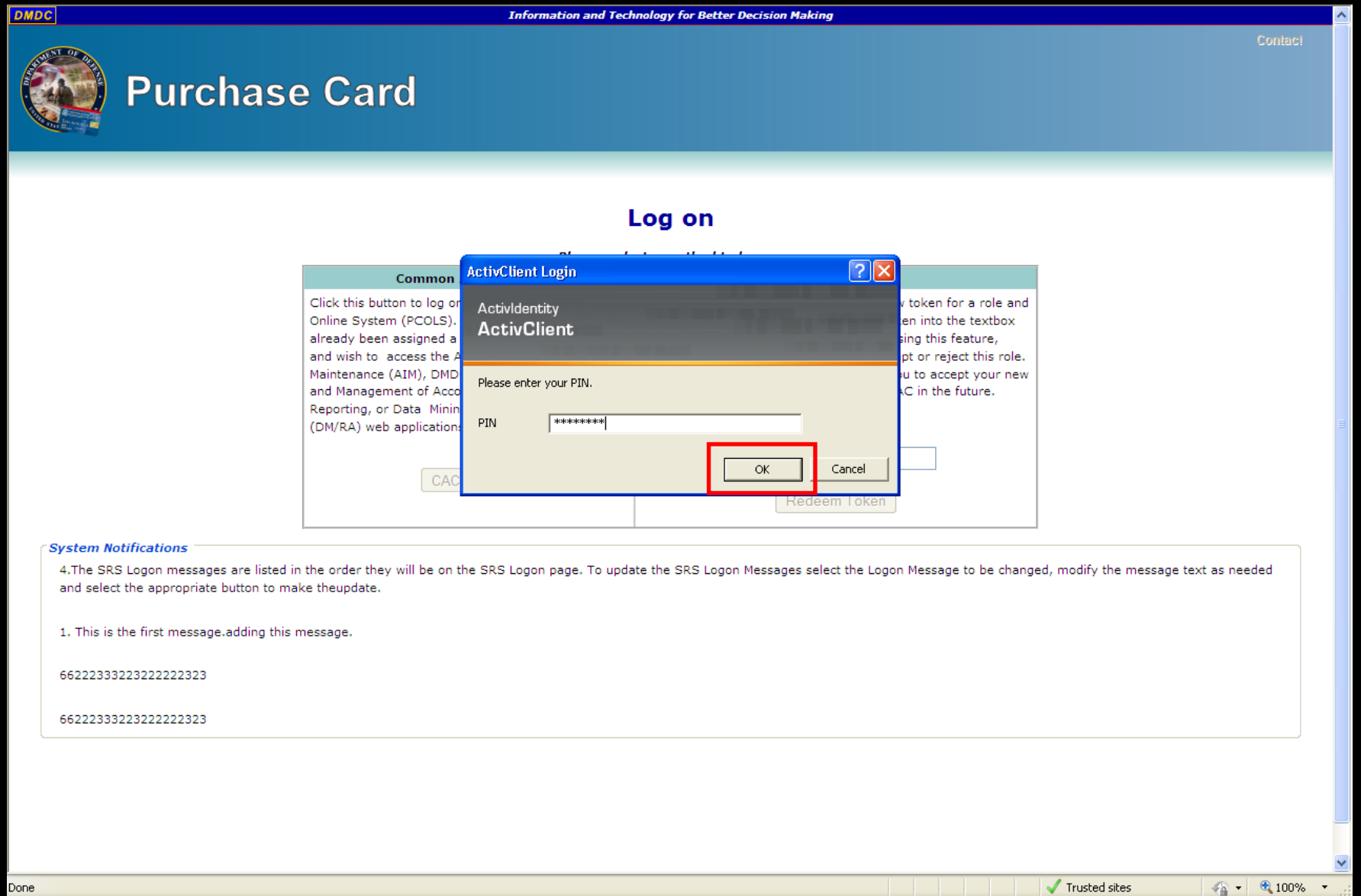
You are at the Standard Mandatory DoD Notice and Consent page. Click the “OK”


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On
Standard Mandatory DoD Notice and Consent
You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.
By using this IS (which includes any device attached to this IS), you consent to the following conditions:
The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
At any time, the USG may inspect and seize data stored on this IS.
Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.
OK

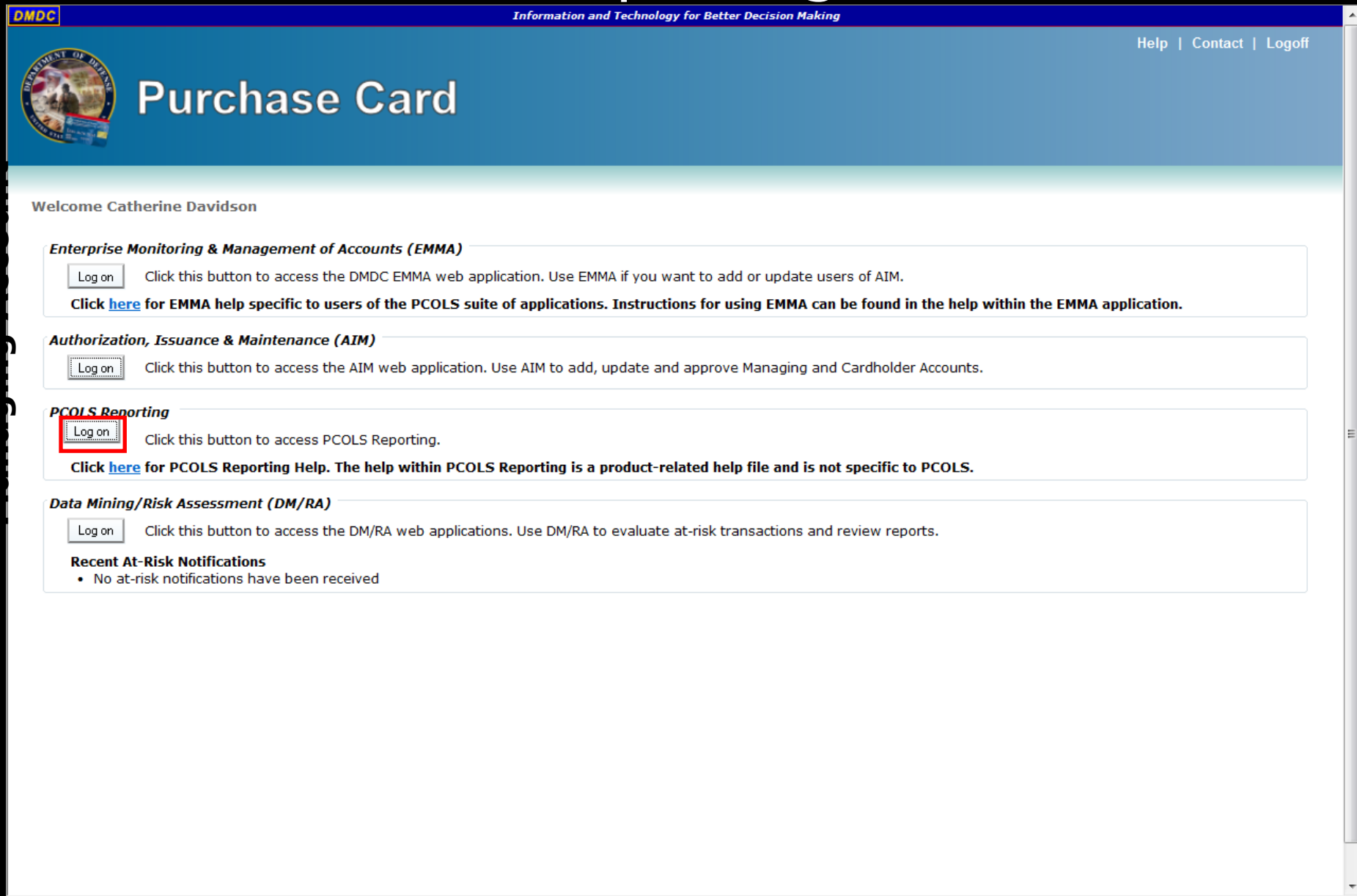
Click the “CAC Log on” button.


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card
Log on
Please select a method to log on:
Common Access Card
Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications.
CAC Log on
Token Redemption
Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future.
Token:
Redeem Token
System Notifications
4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.
1. This is the first message.adding this message.
66222333223222222323
66222333223222222323
Trusted sites
100%

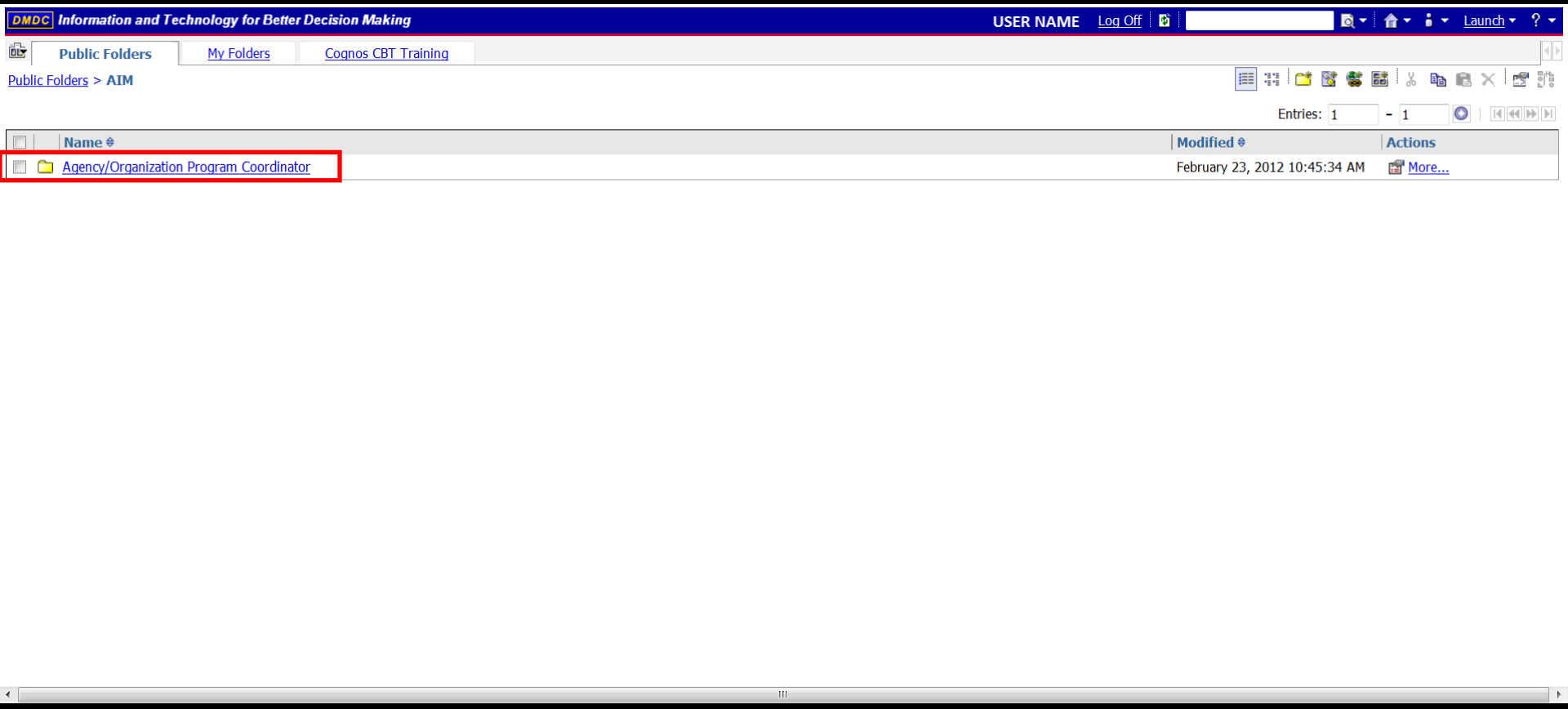
The user enters their PIN. Click the “OK” button.



Click on the “Log on” button for PCOLS Reporting

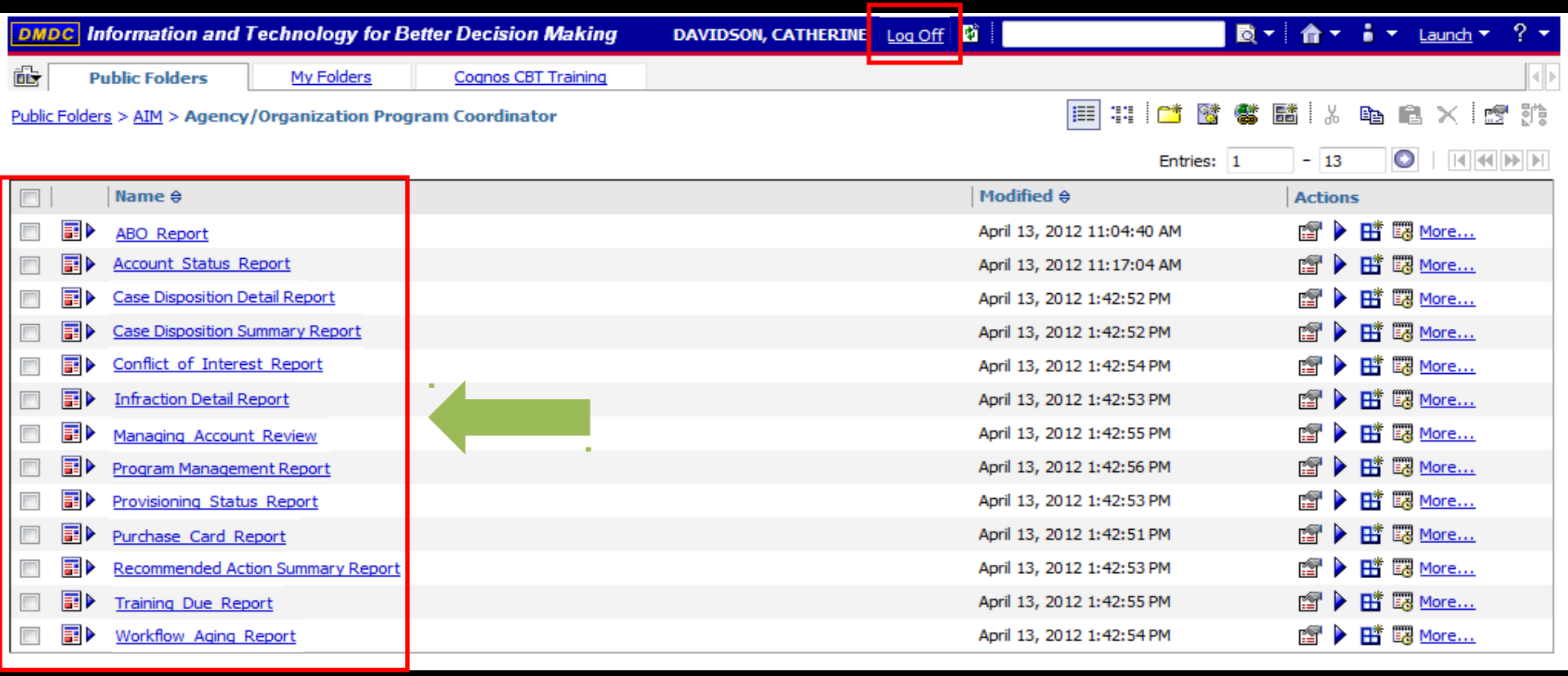

DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff
Purchase Card
Welcome Catherine Davidson
Enterprise Monitoring & Management of Accounts (EMMA)
Log on
Click this button to access the DMDC EMMA web application. Use EMMA if you want to add or update users of AIM.
Click here for EMMA help specific to users of the PCOLS suite of applications. Instructions for using EMMA can be found in the help within the EMMA application.
Authorization, Issuance & Maintenance (AIM)
Log on
Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.
PCOLS Reporting
Log on
Click this button to access PCOLS Reporting.
Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.
Data Mining/Risk Assessment (DM/RA)
Log on
Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.
Recent At-Risk Notifications
No at-risk notifications have been received

Role Selection Screen



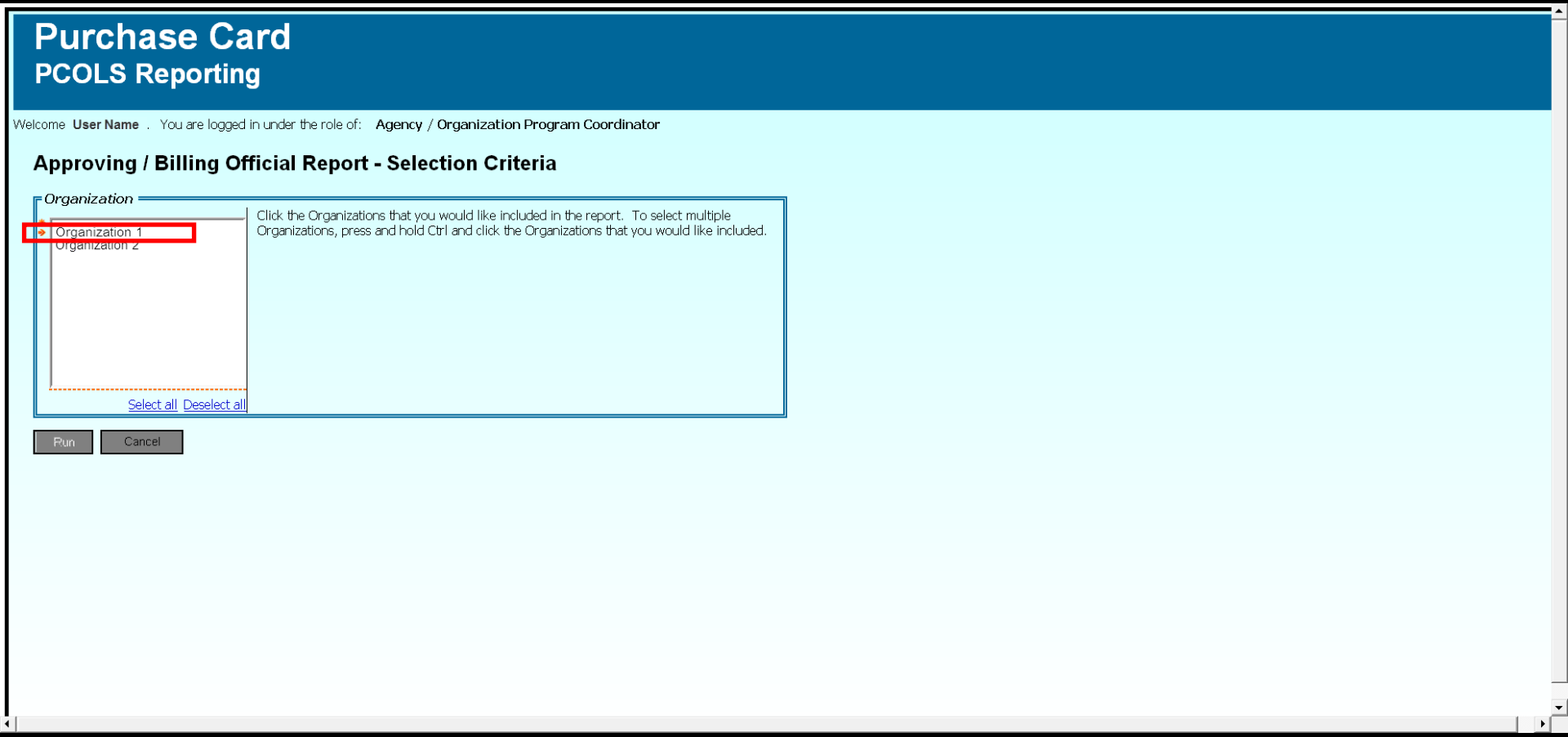
You are at the Role Selection screen . You will need to select the role for the organization the report will be run for. Select the Agency/Organization Program Coordinator role.

Report Selection Screen


DMDC Information and Technology for Better Decision Making
DAVIDSON, CATHERINE
Log Off
Launch
Public Folders
My Folders
Cognos CBT Training
Public Folders > AIM > Agency/Organization Program Coordinator
Entries: 1 - 13
Name
Modified
Actions
ABO_Report April 13, 2012 11:04:40 AM More...
Account_Status_Report April 13, 2012 11:17:04 AM More...
Case Disposition Detail Report April 13, 2012 1:42:52 PM More...
Case Disposition Summary Report April 13, 2012 1:42:52 PM More...
Conflict_of_Interest_Report April 13, 2012 1:42:54 PM More...
Infraction Detail Report April 13, 2012 1:42:53 PM More...
Managing_Account_Review April 13, 2012 1:42:55 PM More...
Program Management Report April 13, 2012 1:42:56 PM More...
Provisioning_Status_Report April 13, 2012 1:42:53 PM More...
Purchase_Card_Report April 13, 2012 1:42:51 PM More...
Recommended Action Summary Report April 13, 2012 1:42:53 PM More...
Training_Due_Report April 13, 2012 1:42:55 PM More...
Workflow_Aging_Report April 13, 2012 1:42:54 PM More...

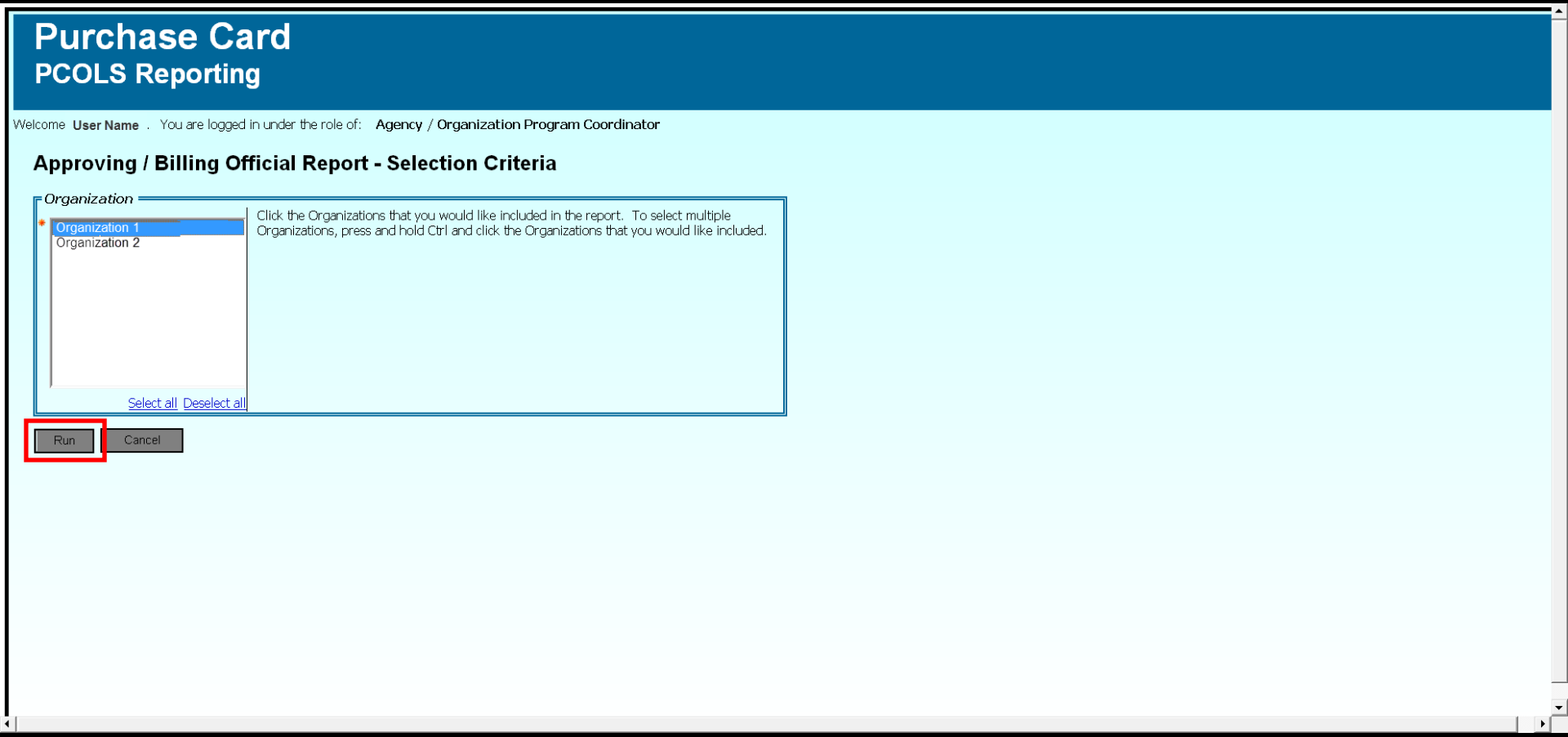
You are at the Report Selection screen . As A/OPC you have the option run all 13 reports. **Select the link for a report you would like to generate.** When you are done running reports, click the “Log Off” link (exit tutorial)

A/BO Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Approving / Billing Official Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
Run
Cancel

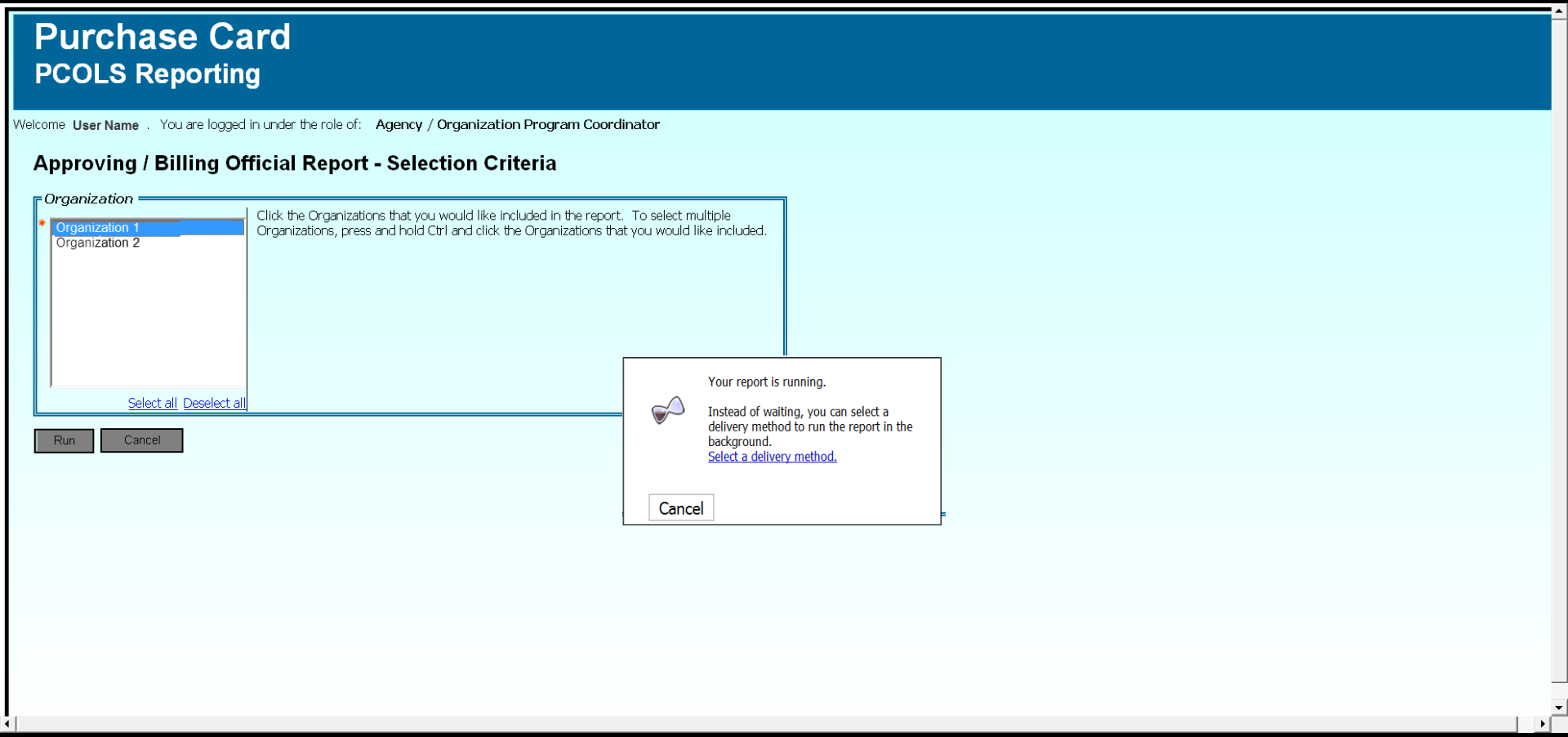
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

A/BO Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Approving / Billing Official Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all
Deselect all
Run
Cancel

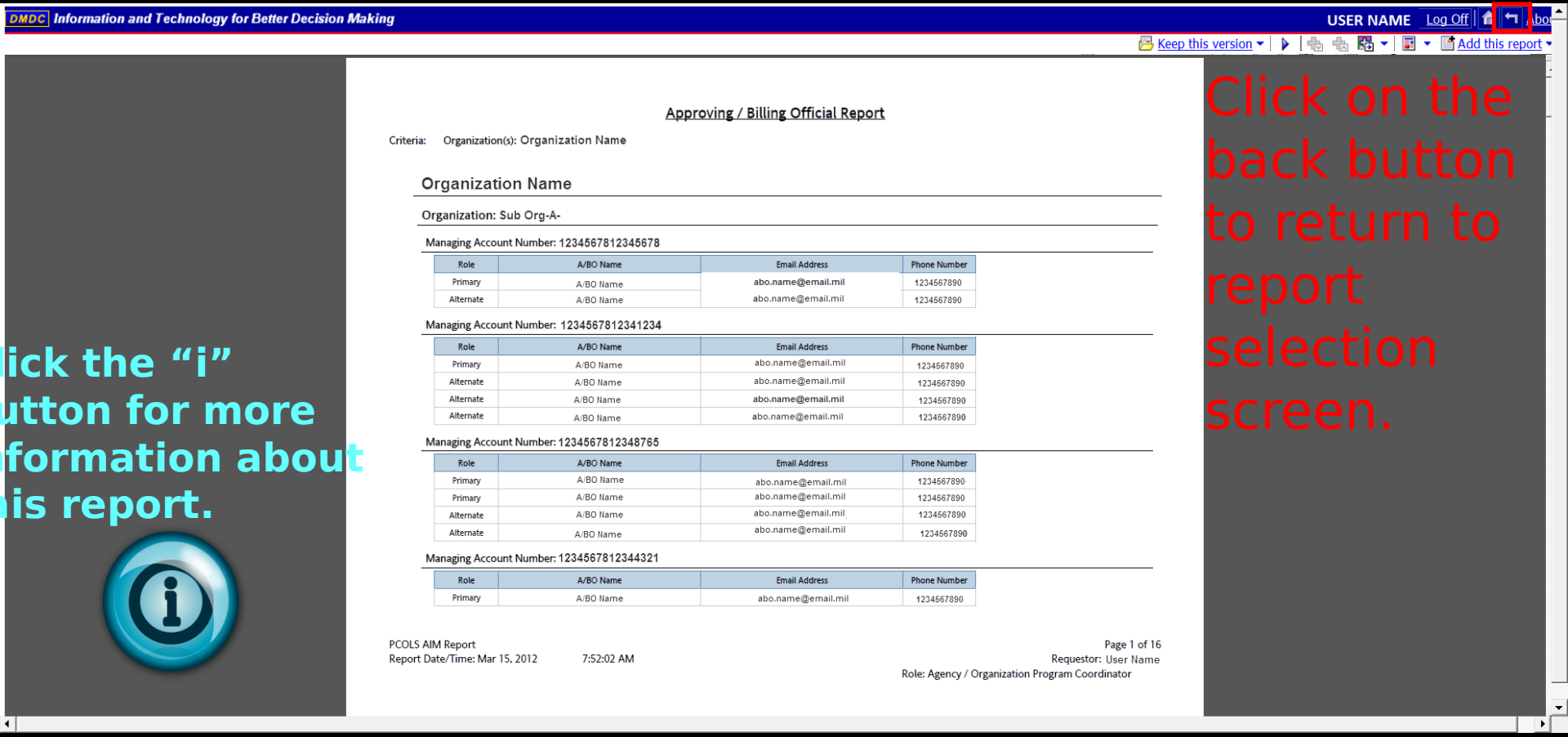
All required criteria has been selected. Click the “Run” button.

A/BO Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Approving / Billing Official Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
Run
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

Your report is running. Please wait...

A/BO Report


DMDC Information and Technology for Better Decision Making
USER NAME
Log Off
Keep this version
Add this report
Approving / Billing Official Report
Criteria: Organization(s): Organization Name
Organization Name
Organization: Sub Org-A-
Managing Account Number: 1234567812345678
Role | A/BO Name | Email Address | Phone Number
Primary | A/BO Name | abo.name@email.mil | 1234567890
Alternate | A/BO Name | abo.name@email.mil | 1234567890
Managing Account Number: 1234567812341234
Role | A/BO Name | Email Address | Phone Number
Primary | A/BO Name | abo.name@email.mil | 1234567890
Alternate | A/BO Name | abo.name@email.mil | 1234567890
Alternate | A/BO Name | abo.name@email.mil | 1234567890
Alternate | A/BO Name | abo.name@email.mil | 1234567890
Managing Account Number: 1234567812348765
Role | A/BO Name | Email Address | Phone Number
Primary | A/BO Name | abo.name@email.mil | 1234567890
Primary | A/BO Name | abo.name@email.mil | 1234567890
Alternate | A/BO Name | abo.name@email.mil | 1234567890
Alternate | A/BO Name | abo.name@email.mil | 1234567890
Managing Account Number: 1234567812344321
Role | A/BO Name | Email Address | Phone Number
Primary | A/BO Name | abo.name@email.mil | 1234567890
PCOLS AIM Report
Report Date/Time: Mar 15, 2012 7:52:02 AM
Page 1 of 16
Requestor: User Name
Role: Agency / Organization Program Coordinator

lick the "i" utton for more formation about is report.

Click on the back button to return to report selection screen.

The report has been generated. All A/BOs, Primary and Alternate, are displayed beneath their corresponding Managing Account for the selected organization.

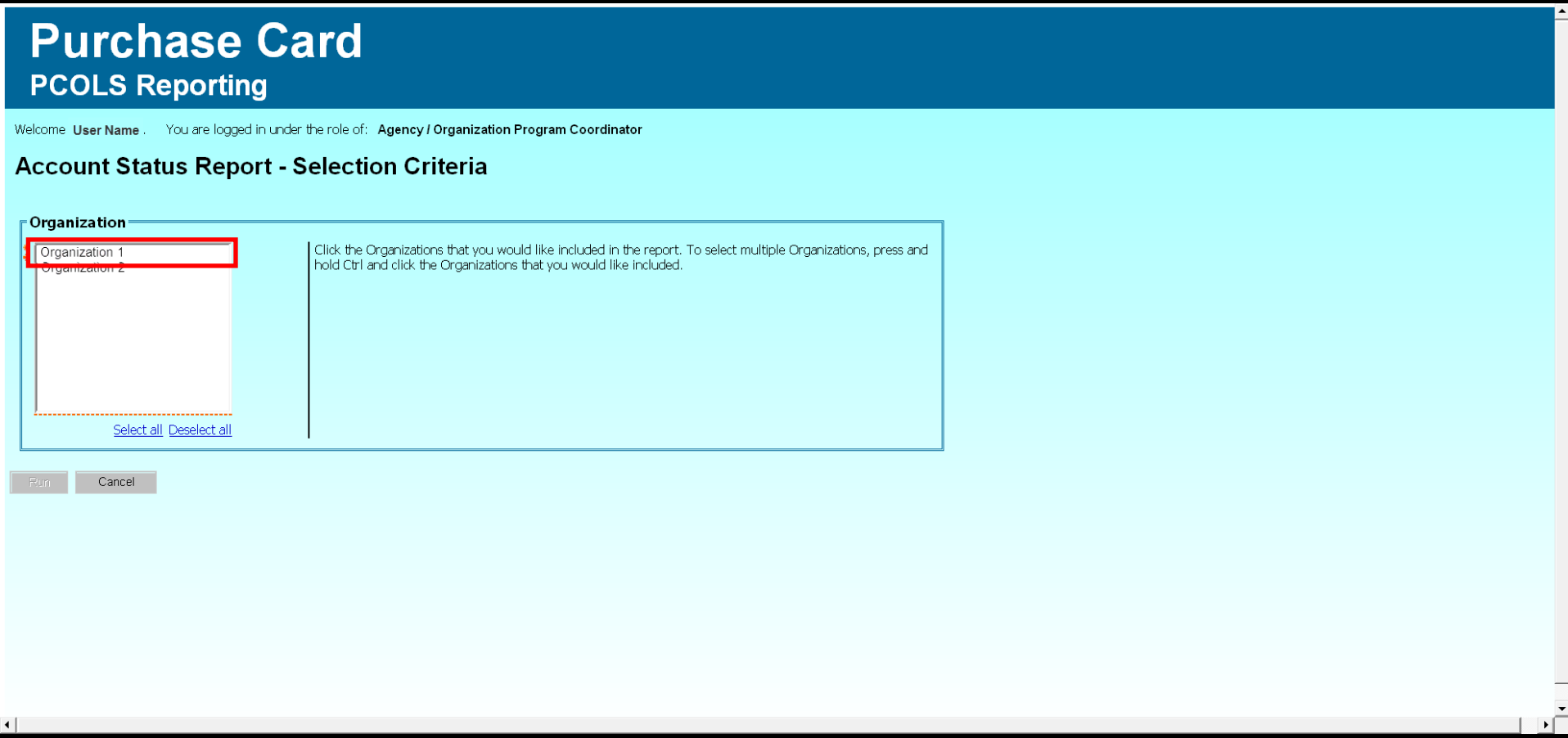
A/BO Report

The **benefits** of running this report:

- Quick check of A/BOs assigned to accounts
- Full Managing Account number displayed
- Cross reference of A/BOs that have access to Data Mining and Risk Assessment (DM/RA)
- Verify where PCOLS notification emails are being sent

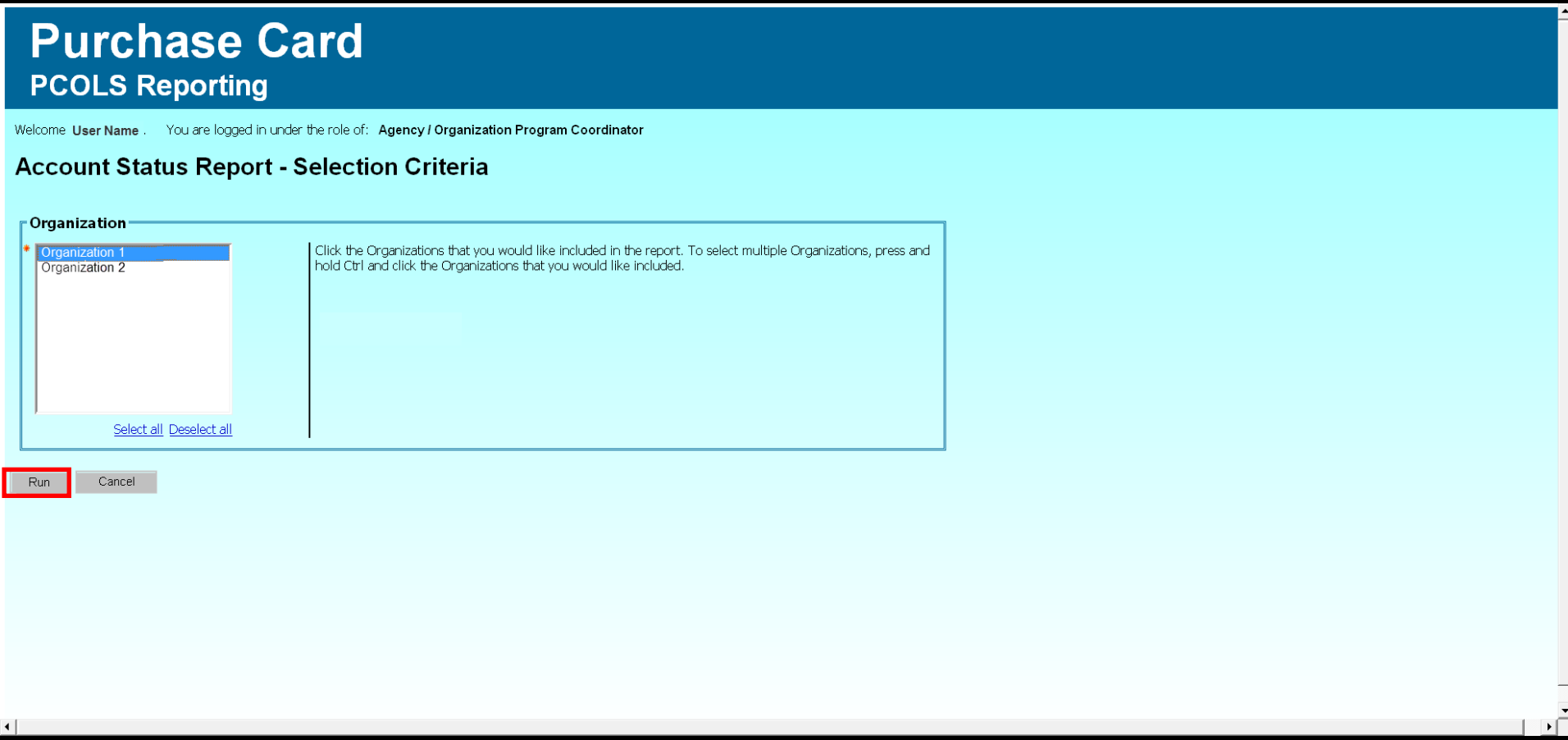
Scenario: The A/OPC runs this report at the end of the billing cycle to verify that the correct A/BOs are assigned to their accounts. In the case of incorrect users being listed, the A/OPC can perform the necessary maintenance in AIM.

Account Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Account Status Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Run
Cancel

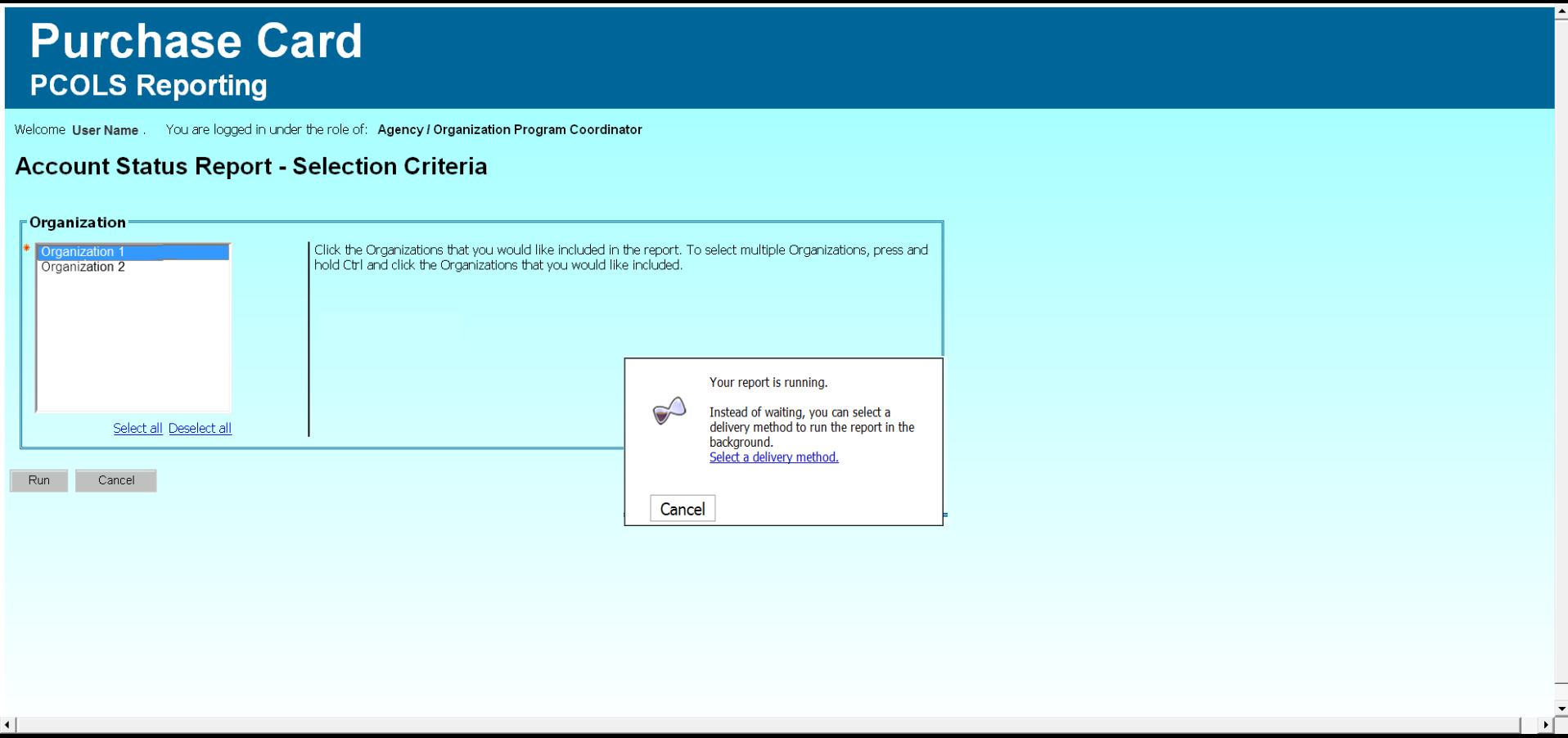
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Account Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Account Status Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
Run
Cancel

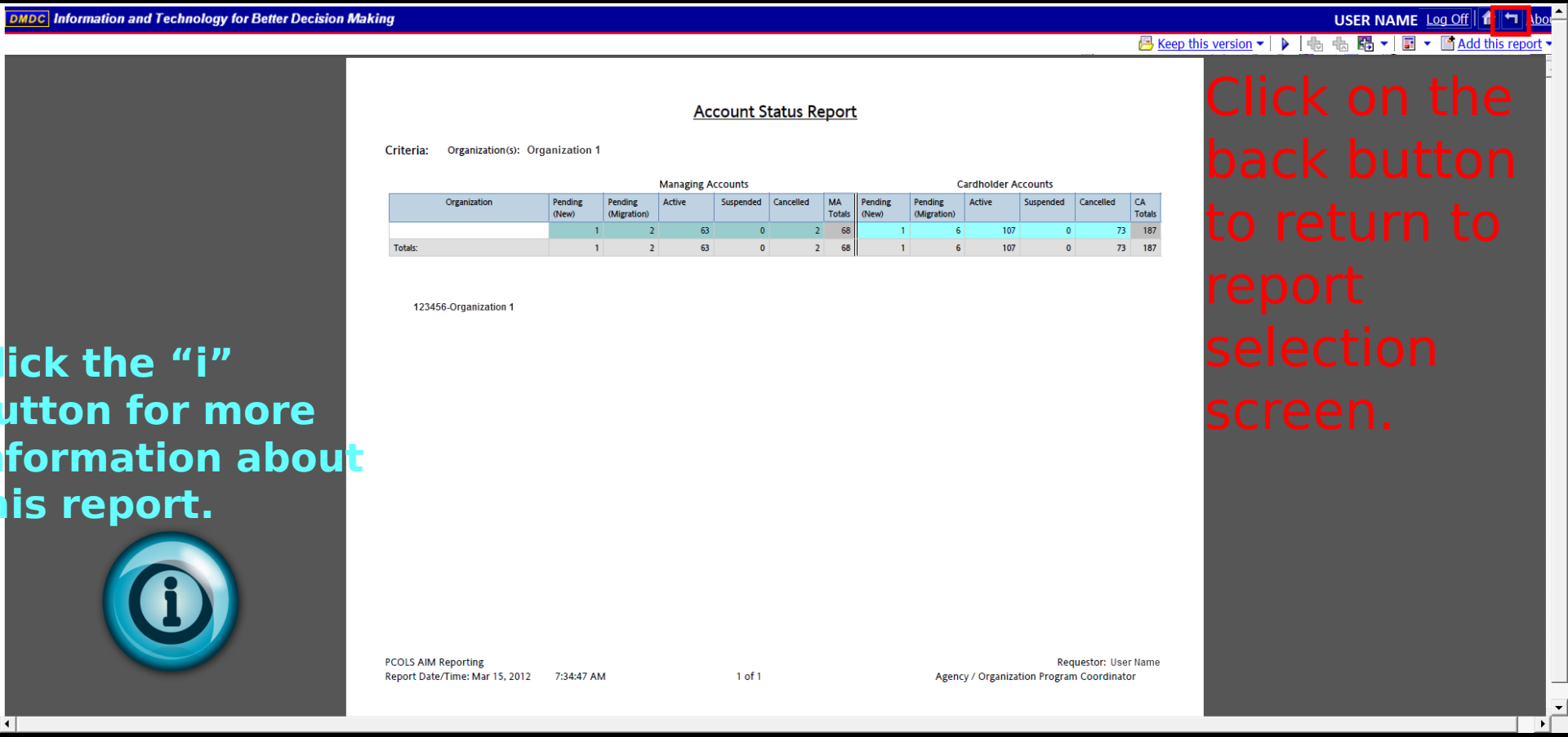
All required criteria has been selected. Click the “Run” button.

Account Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Account Status Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Run
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

Your report is running. Please wait...

Account Status Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
Account Status Report
Criteria: Organization(s): Organization 1
Managing Accounts
Cardholder Accounts
Organization | Pending (New) | Pending (Migration) | Active | Suspended | Cancelled | MA Totals | Pending (New) | Pending (Migration) | Active | Suspended | Cancelled | CA Totals
1 2 63 0 2 68 1 6 107 0 73 187
Totals: 1 2 63 0 2 68 1 6 107 0 73 187
123456-Organization 1
PCOLS AIM Reporting
Report Date/Time: Mar 15, 2012 7:34:47 AM
1 of 1
Requestor: User Name
Agency / Organization Program Coordinator
lick the "i" utton for more formation about is report.
Click on the back button to return to report selection screen.

The report has been generated. The report details the organization name of the A/OPC; the number of pending, active, suspended, and canceled Managing and Cardholder Accounts; as well as account totals.

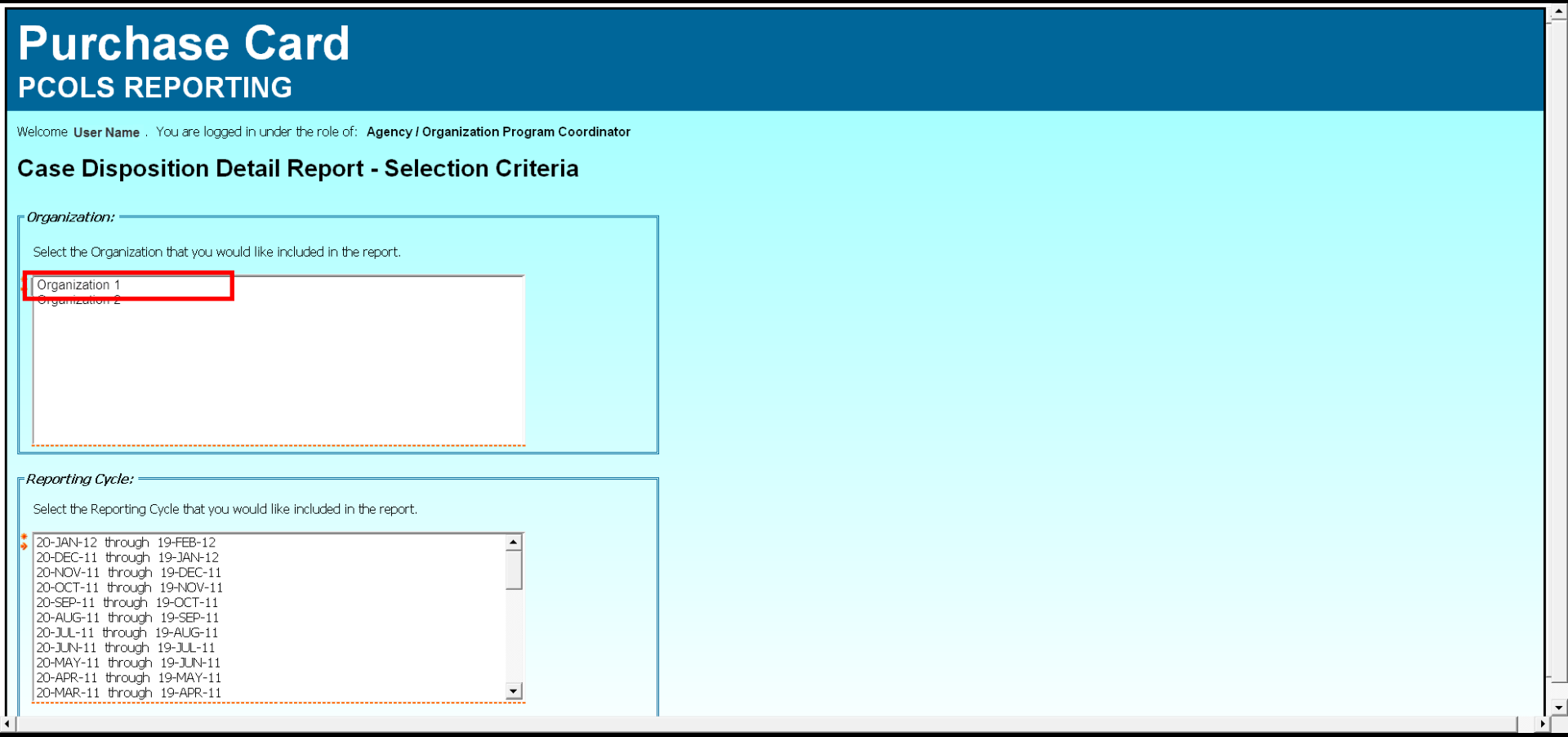
Account Status Report

The **benefits** of running this report:

- Monitor progress of account migration
- Snapshot of account statuses for Cardholder and Managing Accounts
  - Pending, Pending (Migration), Active, Suspended, Canceled

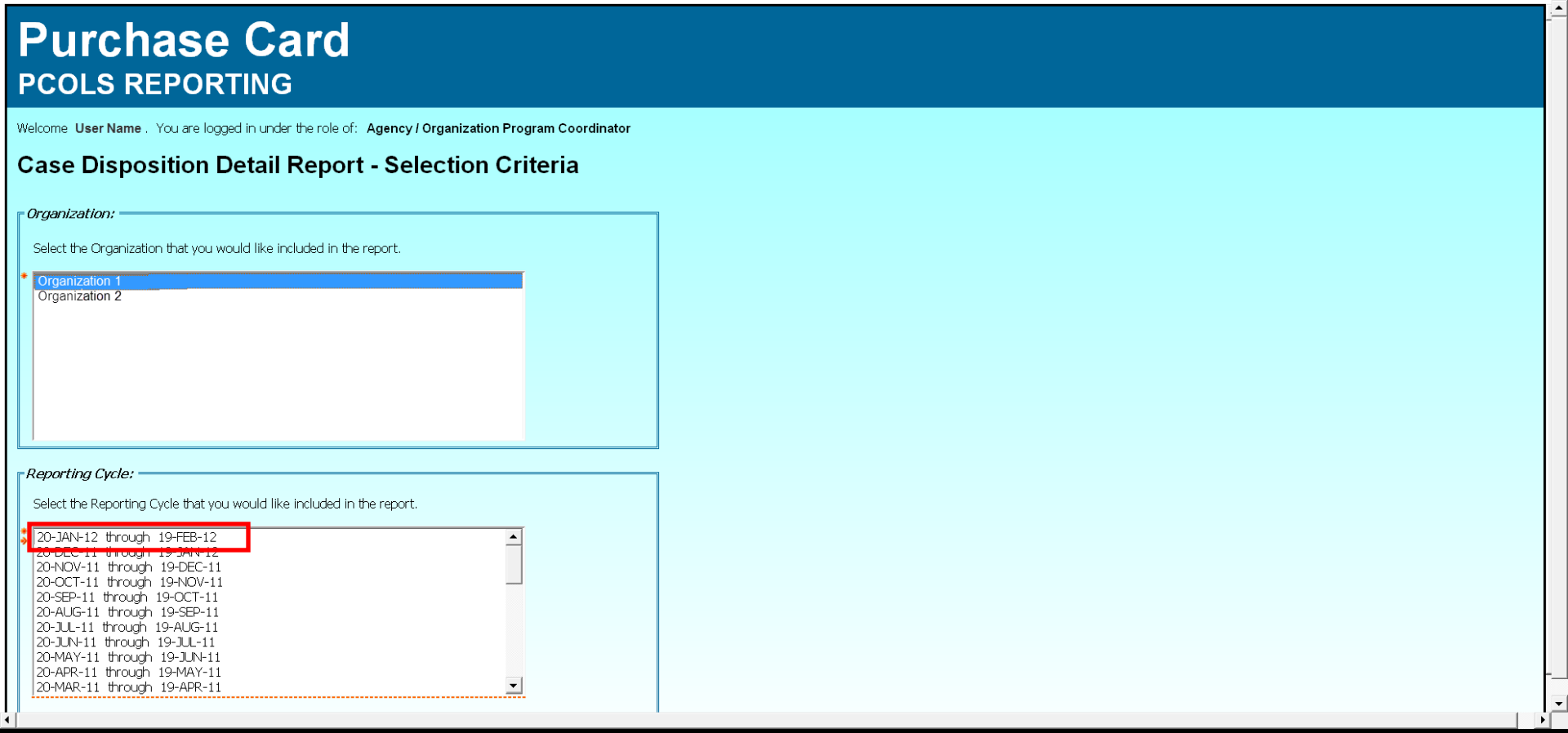
Scenario: The A/OPC Supervisor and A/OPC frequently run this report to check the progress of migrating existing accounts into AIM for an organization that is new to PCOLS. By using this report they can see the account totals for the organization as well as how many are now “active” in AIM or “pending migration.” A deployment percentage can be calculated.

Case Disposition Detail Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11

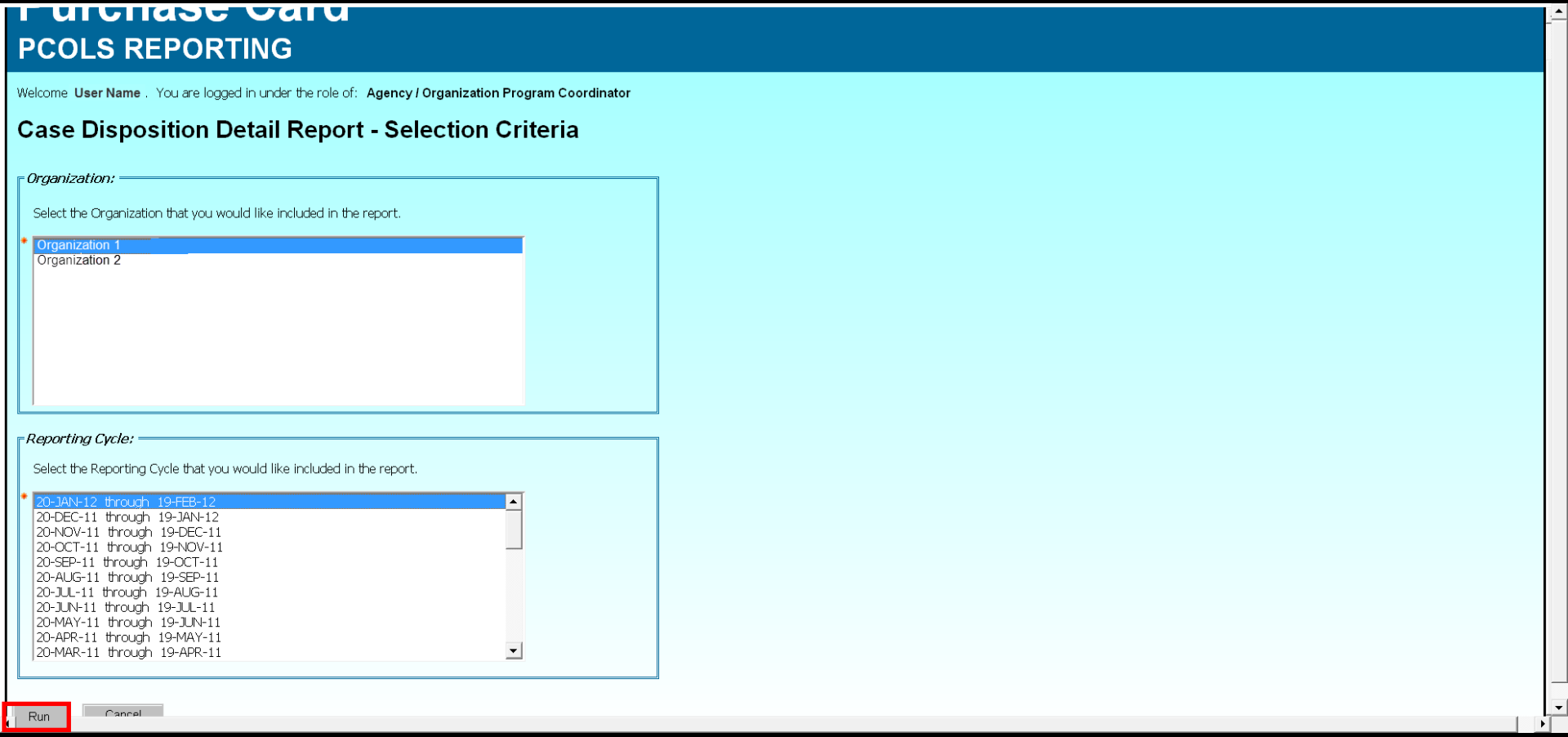
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Case Disposition Detail Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11

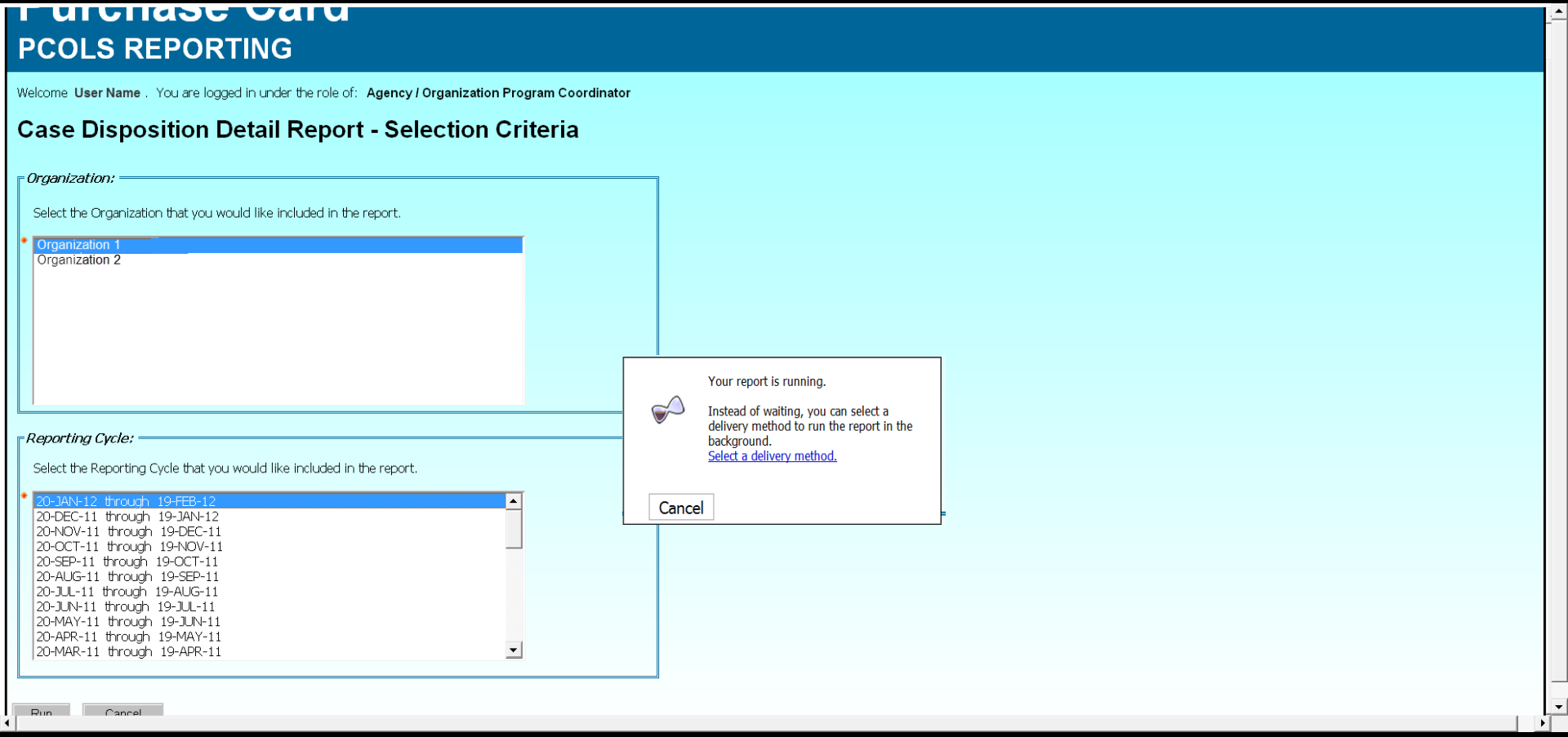
You have the option to select the Reporting Cycle that will be included on the report. Select the “20-Jan-12 through 19-Feb-12” Reporting Cycle.

Case Disposition Detail Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Run
Cancel

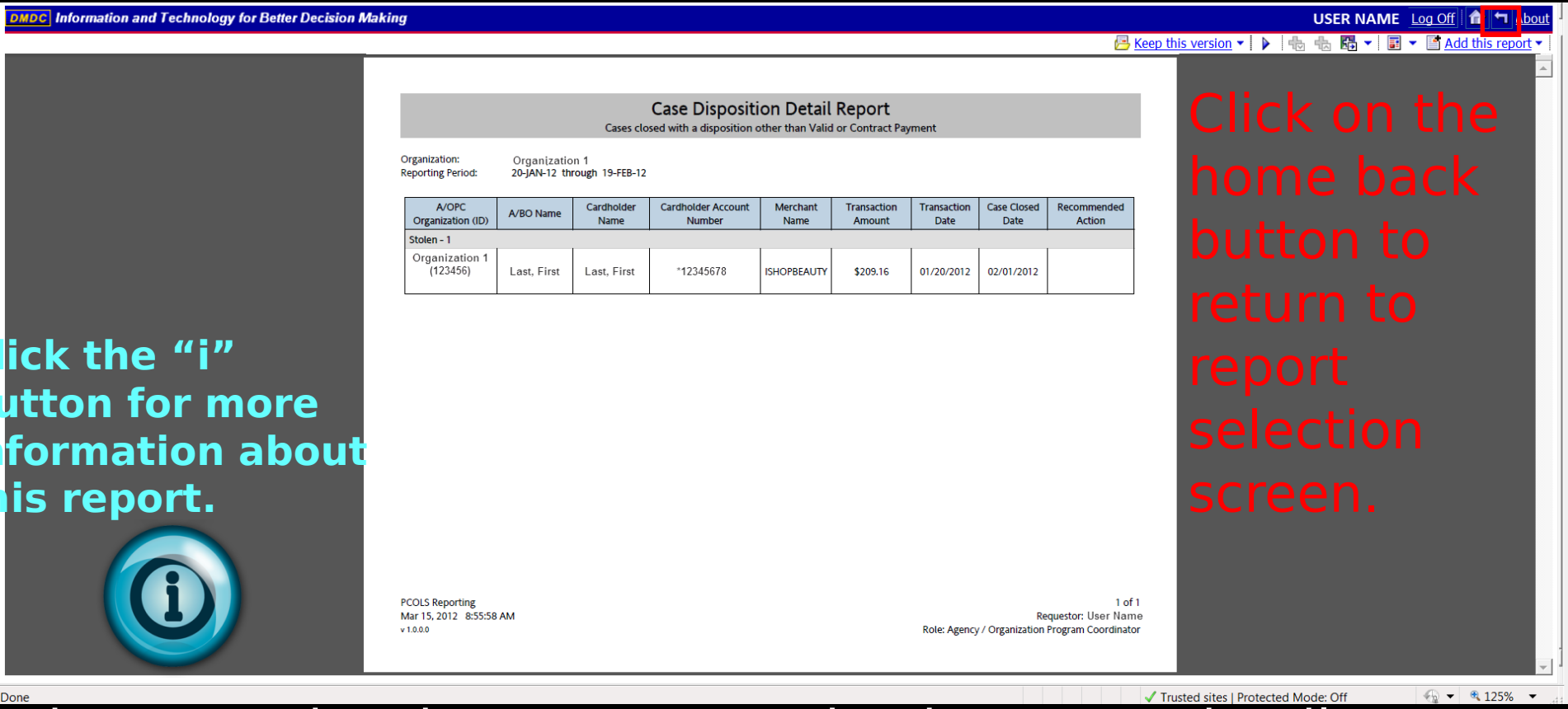
All required criteria has been selected. Click the “Run” button.

Case Disposition Detail Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Run
Cancel

Your report is running. Please wait...

Case Disposition Detail Report



The report has been generated. The report details Data Mining flagged transactions for each selected organization and displays a list of all transaction (case) information for cases closed as not valid or contract

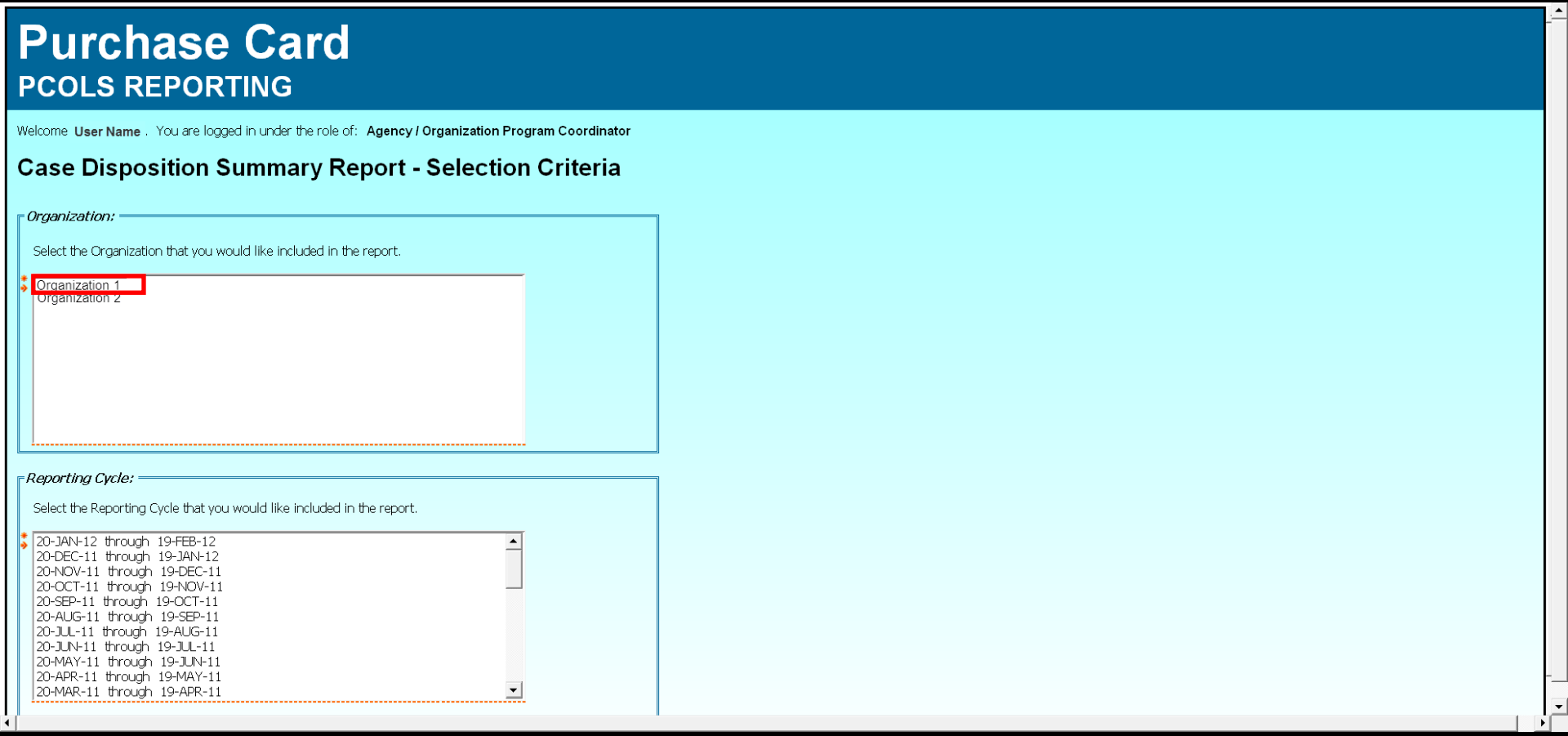
Case Disposition Detail Report

The **benefits** of running this report:

- Quickly review transactions with a disposition other than “Valid” or “Contract Payment” (lost/stolen, fraud, etc.)
- Displays the A/BO and Cardholder for the transaction

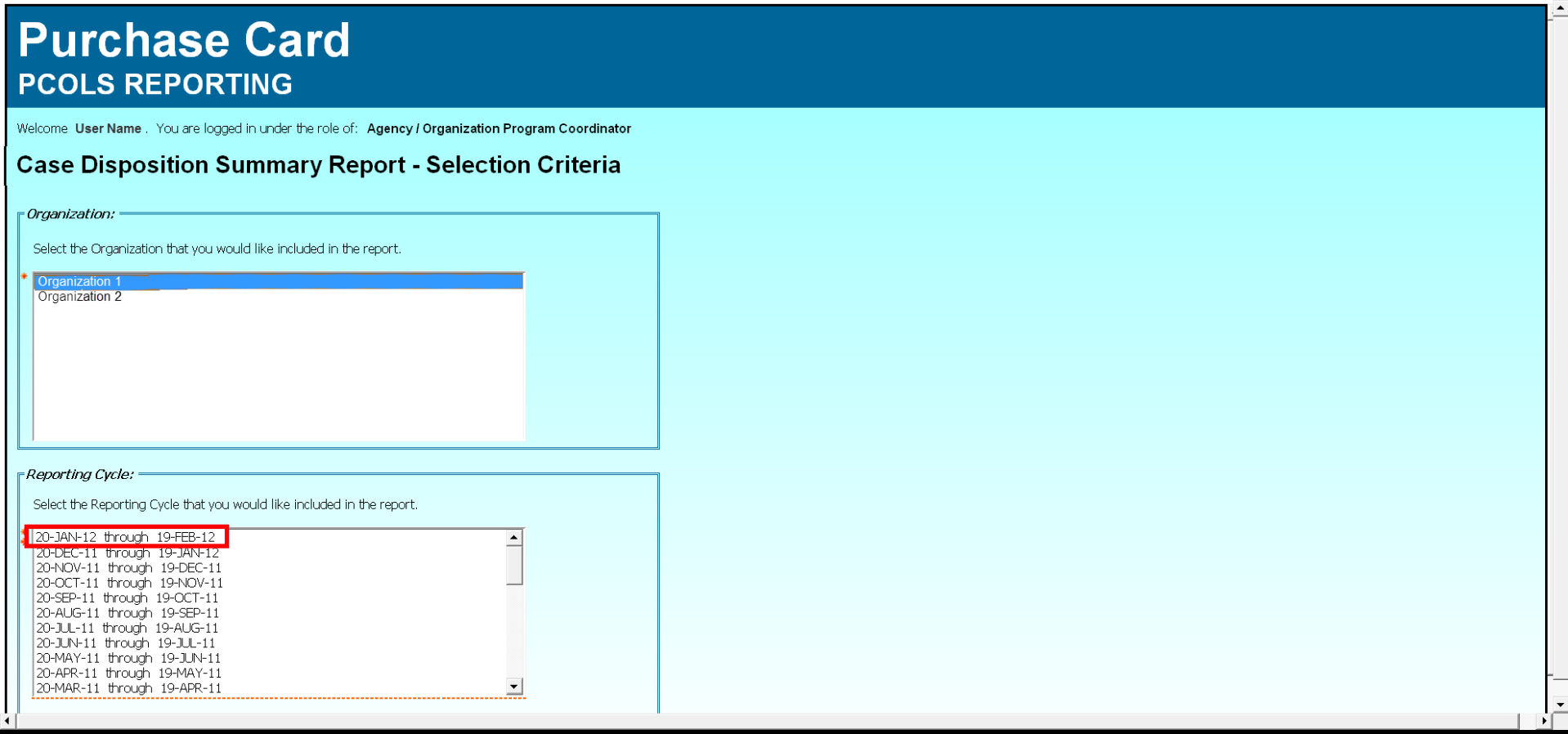
Scenario: The A/OPC frequently completes Independent Reviews on cases dispositioned by their A/BOs in Data Mining and may already be aware of the data displayed in this report. Higher level roles such as the A/OPC Supervisor can use this report to quickly review details from cases at the end of a given billing cycle. Knowing what cases were closed with a disposition other than “Valid” or “Contract Payment” increases internal controls in the organization’s GPC

Case Disposition Summary Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Summary Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11

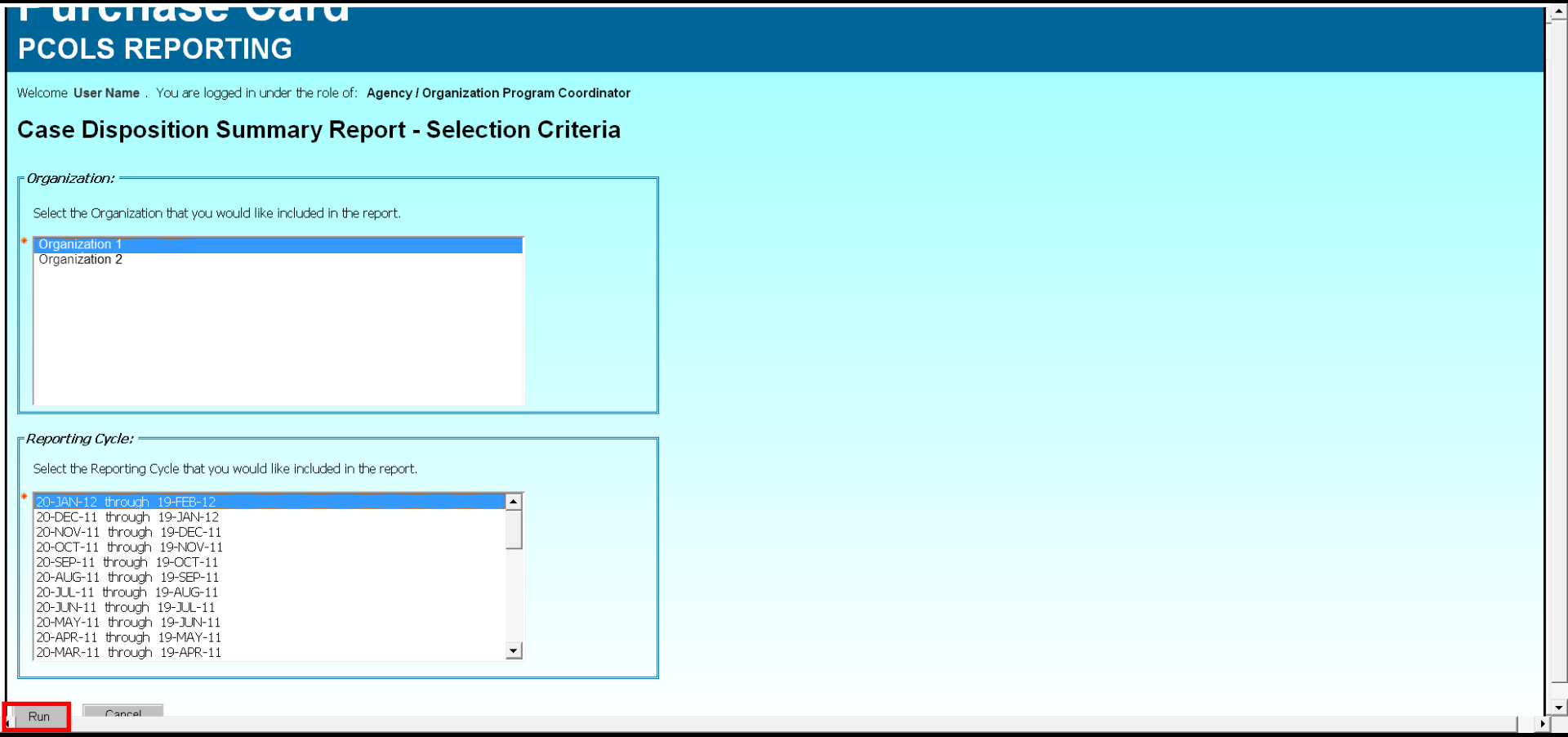
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Case Disposition Summary Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Summary Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11

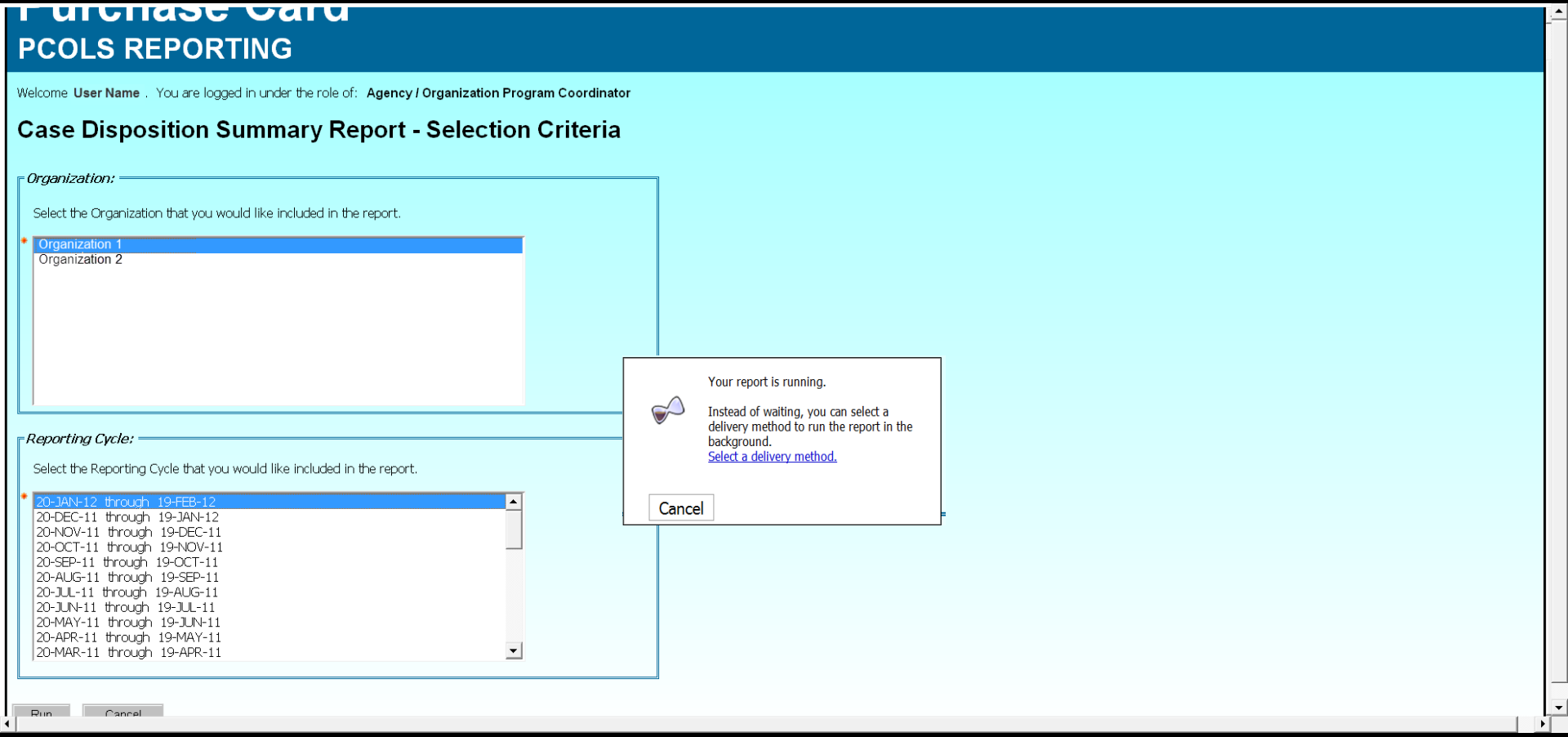
You have the option to select the Reporting Cycle that will be included on the report. Select the “20-Jan-12 through 19-Feb-12” Reporting Cycle.

Case Disposition Summary Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Summary Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Run
Cancel

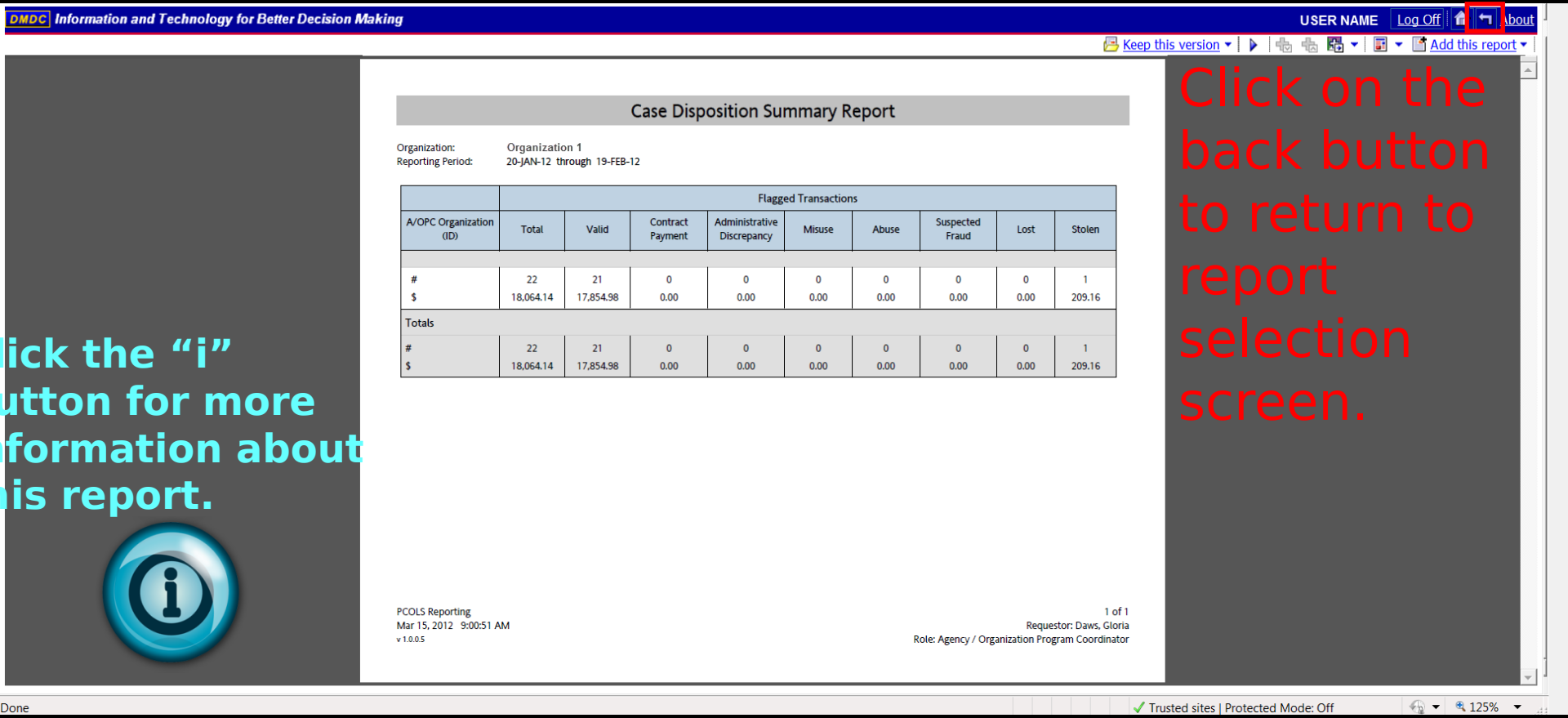
All required criteria has been selected. Click the “Run” button.

Case Disposition Summary Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Case Disposition Summary Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Run
Cancel

Your report is running. Please wait...

Case Disposition Summary Report



The report has been generated. The report details the organization name of the A/OPC, the total number of cases closed (including the break down by disposition). The total dollar value is included as well.

Case Disposition Summary Report

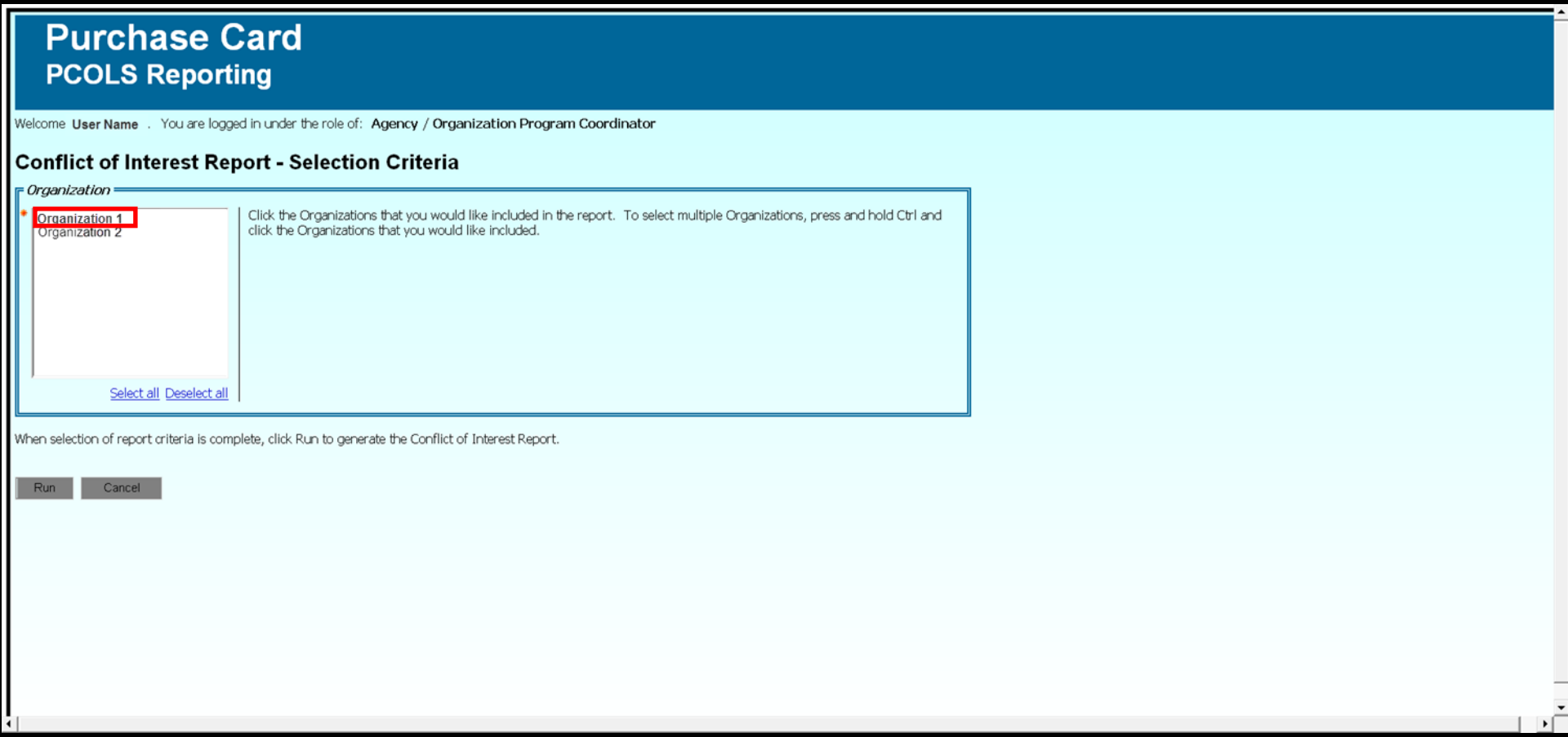
The **benefits** of running this report:

- Quickly review total dollar amounts for all flagged transactions in a given A/OPC organization

- View all cases reviewed at the end of the billing cycle to find total cases and the disposition assigned by the A/BO

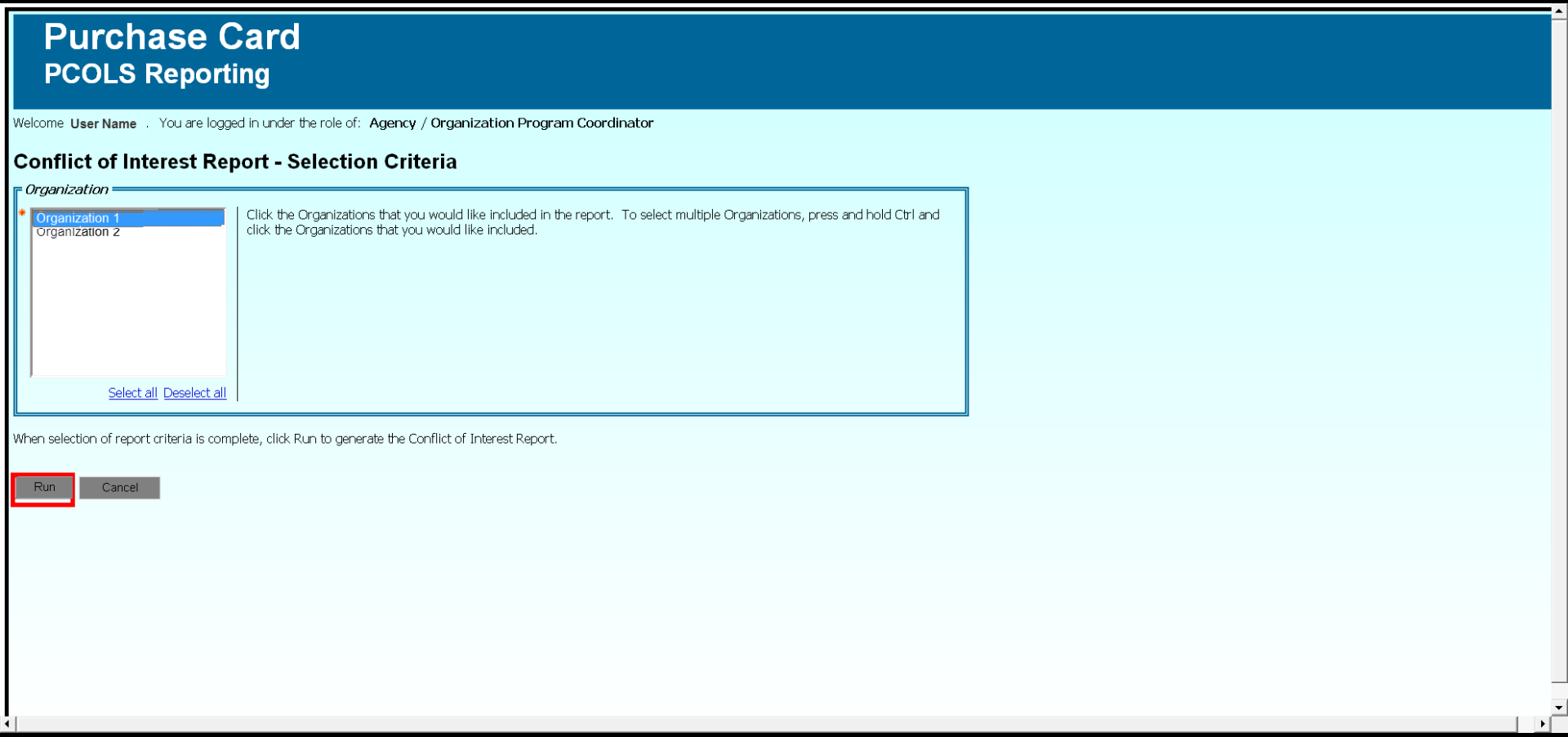
Scenario: The A/OPC, as well as higher level users, run this report at the end of each billing cycle to track cases completed by their A/BOs. This report may assist these users in identifying patterns, such as “Lost/Stolen” account totals. This enhances accountability and internal controls within the organization’s GPC program.

Conflict of Interest Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Conflict of Interest Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
When selection of report criteria is complete, click Run to generate the Conflict of Interest Report.
Run
Cancel

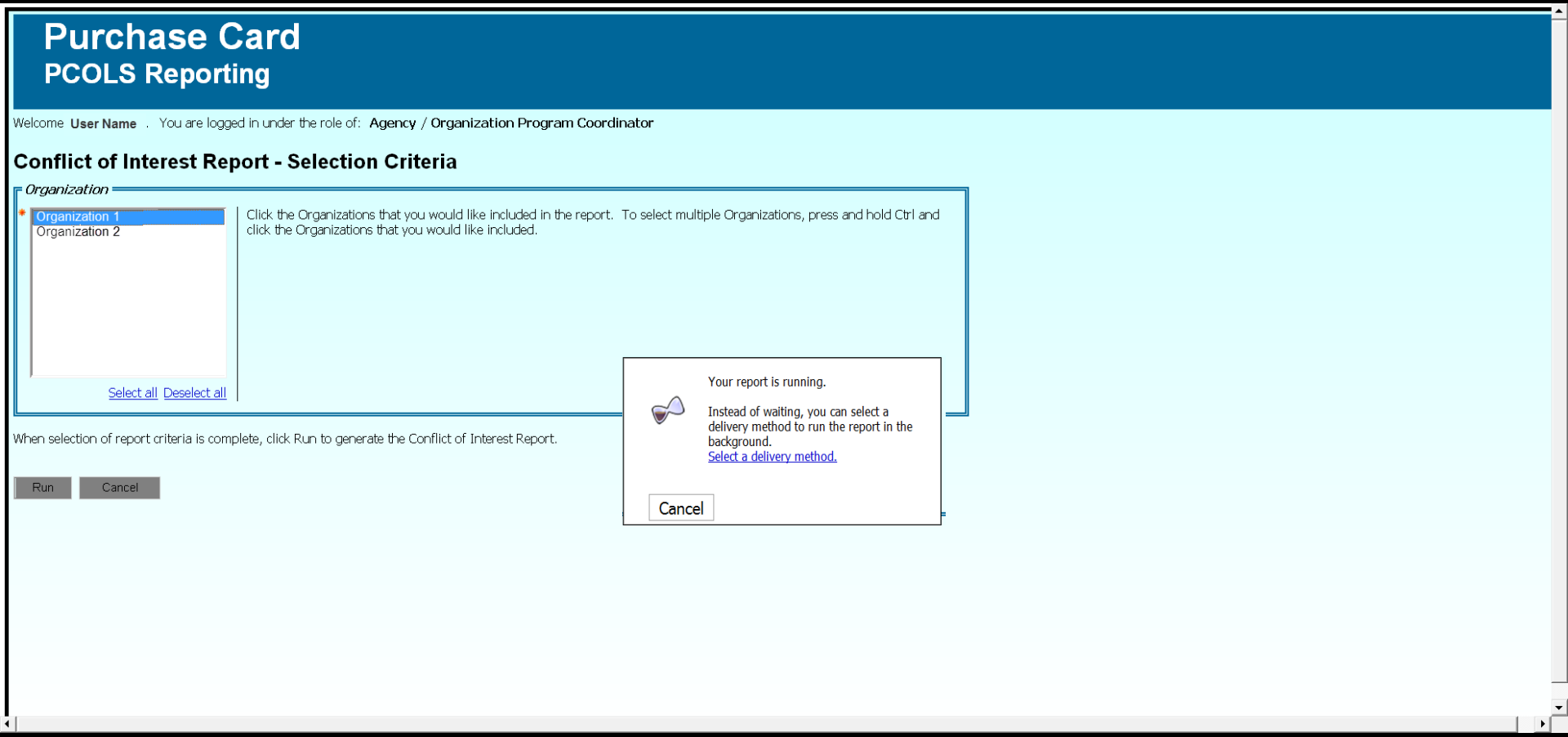
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Conflict of Interest Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Conflict of Interest Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
When selection of report criteria is complete, click Run to generate the Conflict of Interest Report.
Run
Cancel

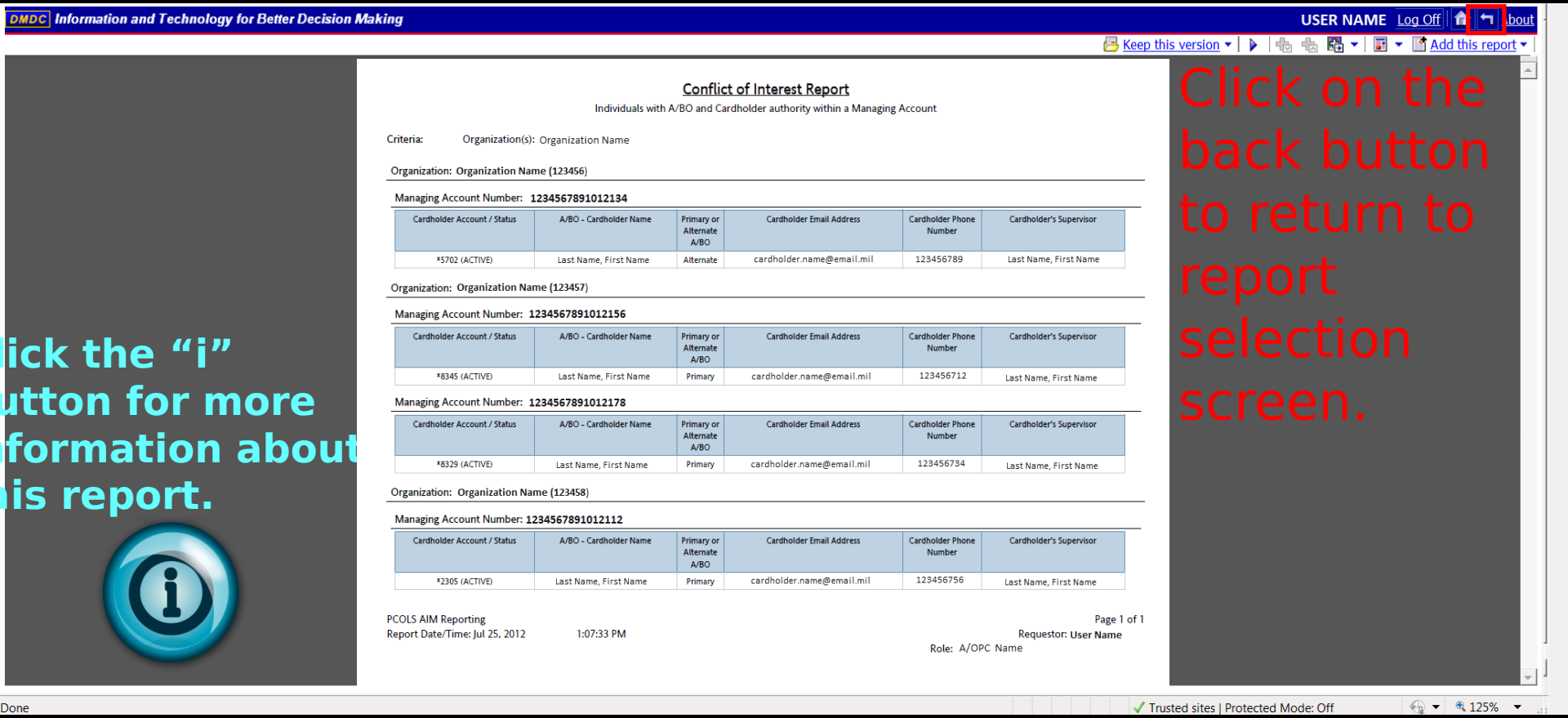
All required criteria has been selected. Click the “Run” button.

Conflict of Interest Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Conflict of Interest Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
When selection of report criteria is complete, click Run to generate the Conflict of Interest Report.
Run
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

Your report is running. Please wait.

Conflict of Interest Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
Conflict of Interest Report
Individuals with A/BO and Cardholder authority within a Managing Account
Criteria: Organization(s): Organization Name
Organization: Organization Name (123456)
Managing Account Number: 1234567891012134
Cardholder Account / Status | A/BO - Cardholder Name | Primary or Alternate A/BO | Cardholder Email Address | Cardholder Phone Number | Cardholder's Supervisor
*5702 (ACTIVE) | Last Name, First Name | Alternate | cardholder.name@email.mil | 123456789 | Last Name, First Name
Organization: Organization Name (123457)
Managing Account Number: 1234567891012156
*8345 (ACTIVE) | Last Name, First Name | Primary | cardholder.name@email.mil | 123456712 | Last Name, First Name
Managing Account Number: 1234567891012178
*8329 (ACTIVE) | Last Name, First Name | Primary | cardholder.name@email.mil | 123456734 | Last Name, First Name
Organization: Organization Name (123458)
Managing Account Number: 1234567891012112
*2305 (ACTIVE) | Last Name, First Name | Primary | cardholder.name@email.mil | 123456756 | Last Name, First Name
PCOLS AIM Reporting
Report Date/Time: Jul 25, 2012 1:07:33 PM
Page 1 of 1
Requestor: User Name
Role: A/OPC Name
ick the "i" utton for more formation about is report.
Click on the back button to return to report selection screen.
Done
Trusted sites | Protected Mode: Off
125%

The report has been generated. The report details a list of individuals within an organization that hold an A/BO role and a Cardholder role within the same Active or Suspended Managing Account.

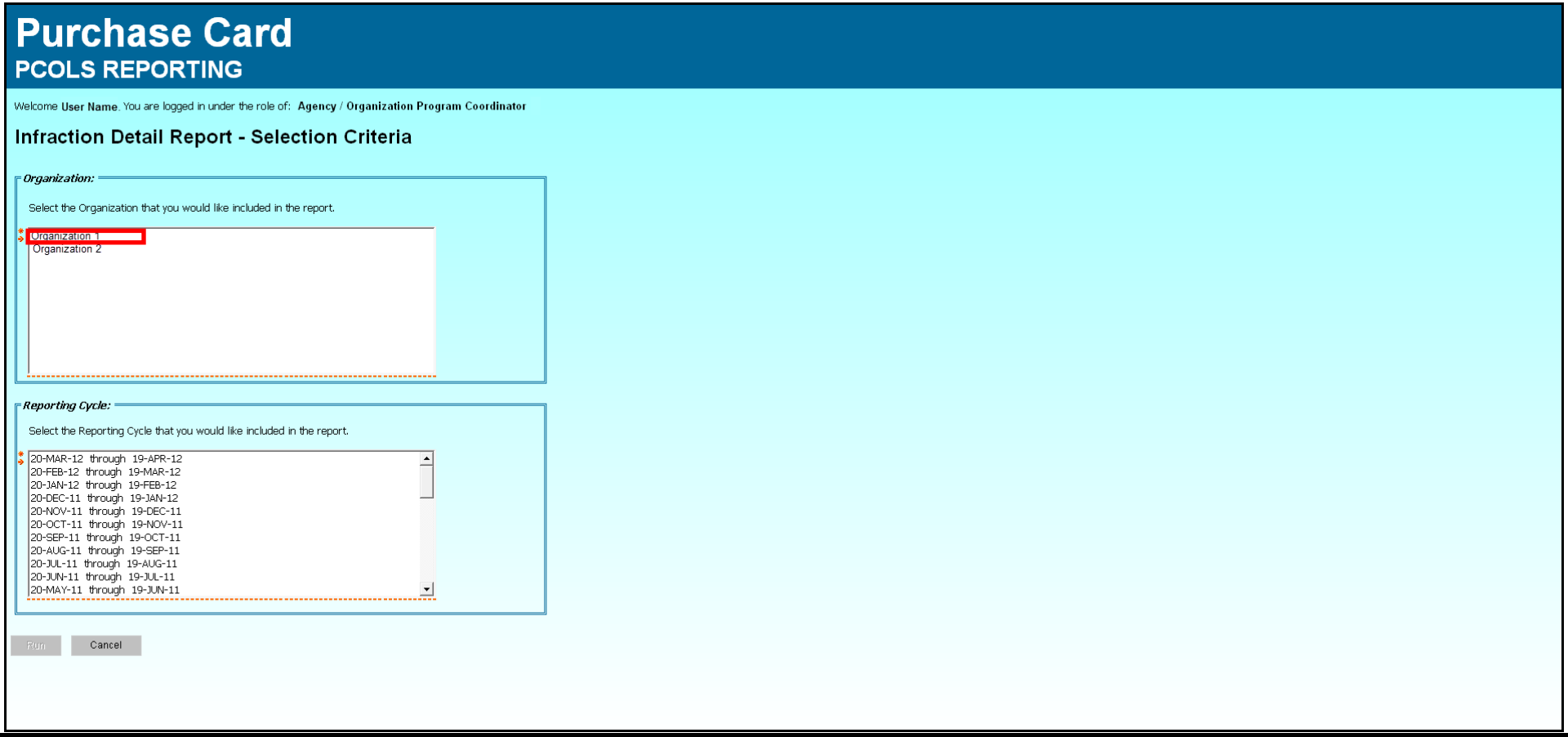
Conflict of Interest Report

The **benefits** of running this report:

- Quickly find areas where there is a conflict of interest with Cardholders and A/BOs
- Displays all data necessary to locate accounts to take corrective action

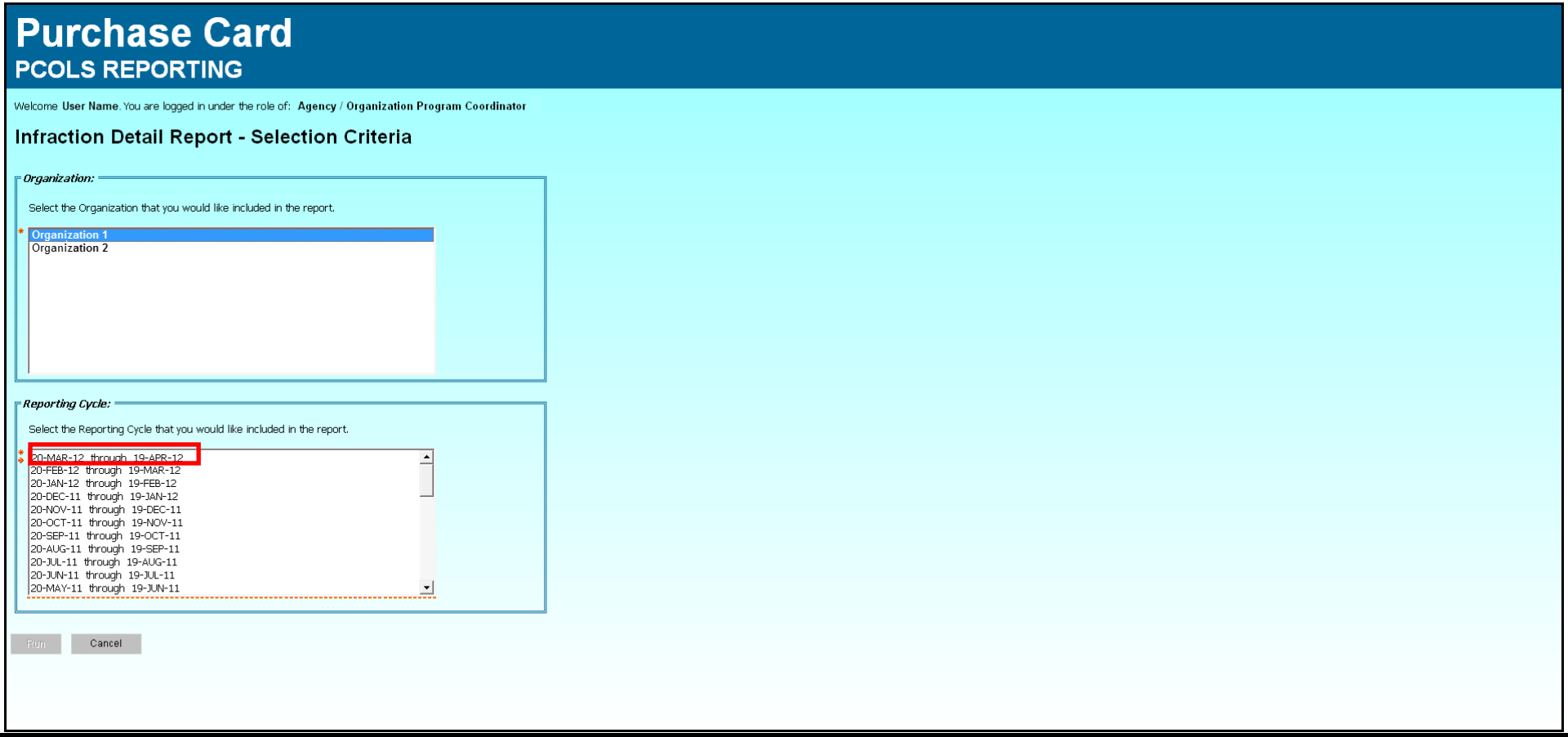
Scenario: The A/OPC is diligent in monitoring their GPC program, ensuring that they do not have situation where there is a conflict of interest. This report as a way to confirm there are no issues that may have been accidently overlooked. Higher level roles run this report as an additional level of supervision and internal controls.

Infraction Detail Report


Purchase Card
PCOLS REPORTING
Welcome User Name. You are logged in under the role of: Agency / Organization Program Coordinator
Infraction Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-MAR-12 through 19-APR-12
20-FEB-12 through 19-MAR-12
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
Run
Cancel

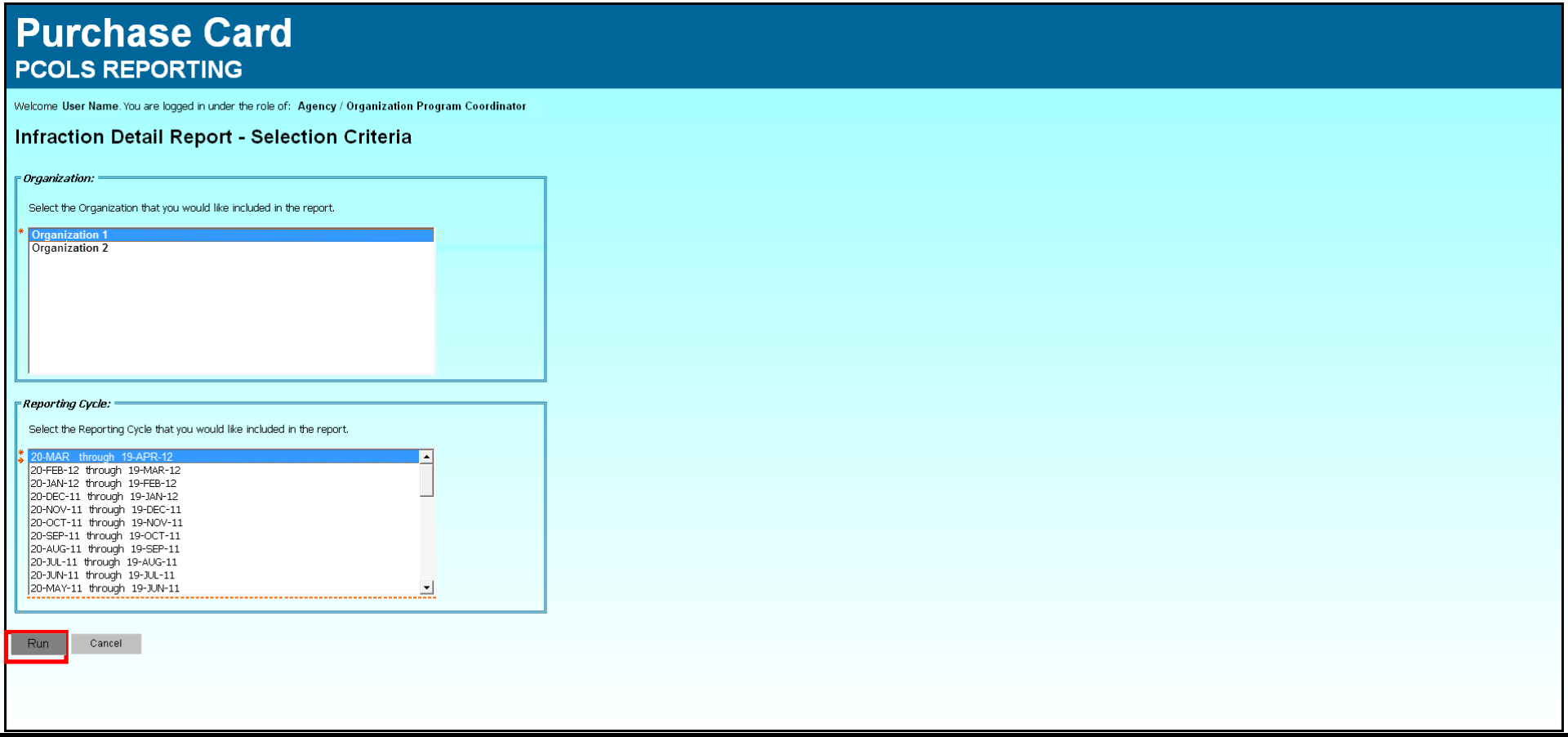
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Infraction Detail Report


Purchase Card
PCOLS REPORTING
Welcome User Name. You are logged in under the role of: Agency / Organization Program Coordinator
Infraction Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-MAR-12 through 19-APR-12
20-FEB-12 through 19-MAR-12
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
Run
Cancel

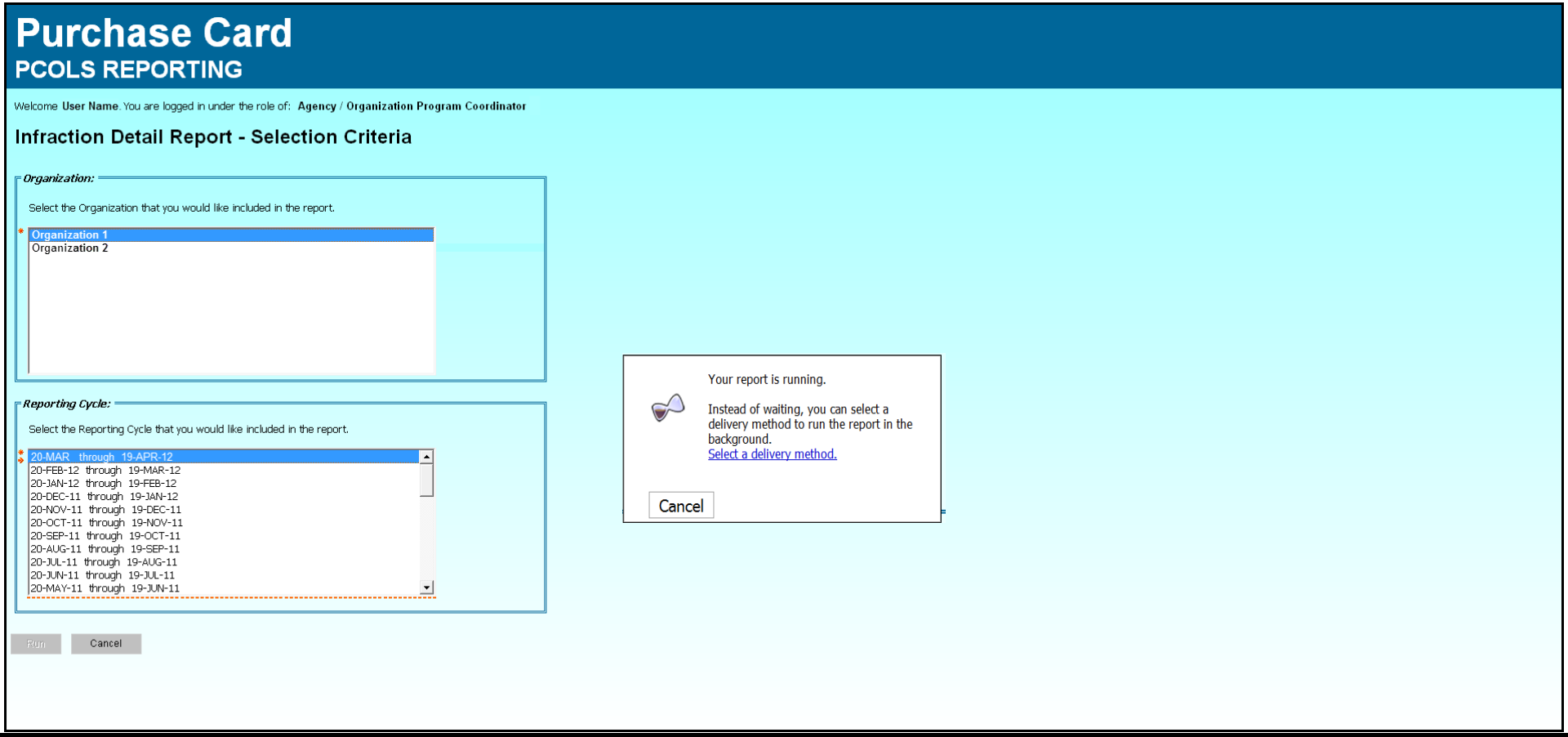
You have the option to select the Reporting Cycle that will be included on the report. Select the “20-MAR-12 through 19-APR-12” Reporting Cycle.

Infraction Detail Report


Purchase Card
PCOLS REPORTING
Welcome User Name. You are logged in under the role of: Agency / Organization Program Coordinator
Infraction Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-MAR through 19-APR-12
20-FEB-12 through 19-MAR-12
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
Run
Cancel

All required criteria has been selected. Click the “Run” button.

Infraction Detail Report


Purchase Card
PCOLS REPORTING
Welcome User Name. You are logged in under the role of: Agency / Organization Program Coordinator
Infraction Detail Report - Selection Criteria
Organization:
Select the Organization that you would like included in the report.
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Organization 2
Reporting Cycle:
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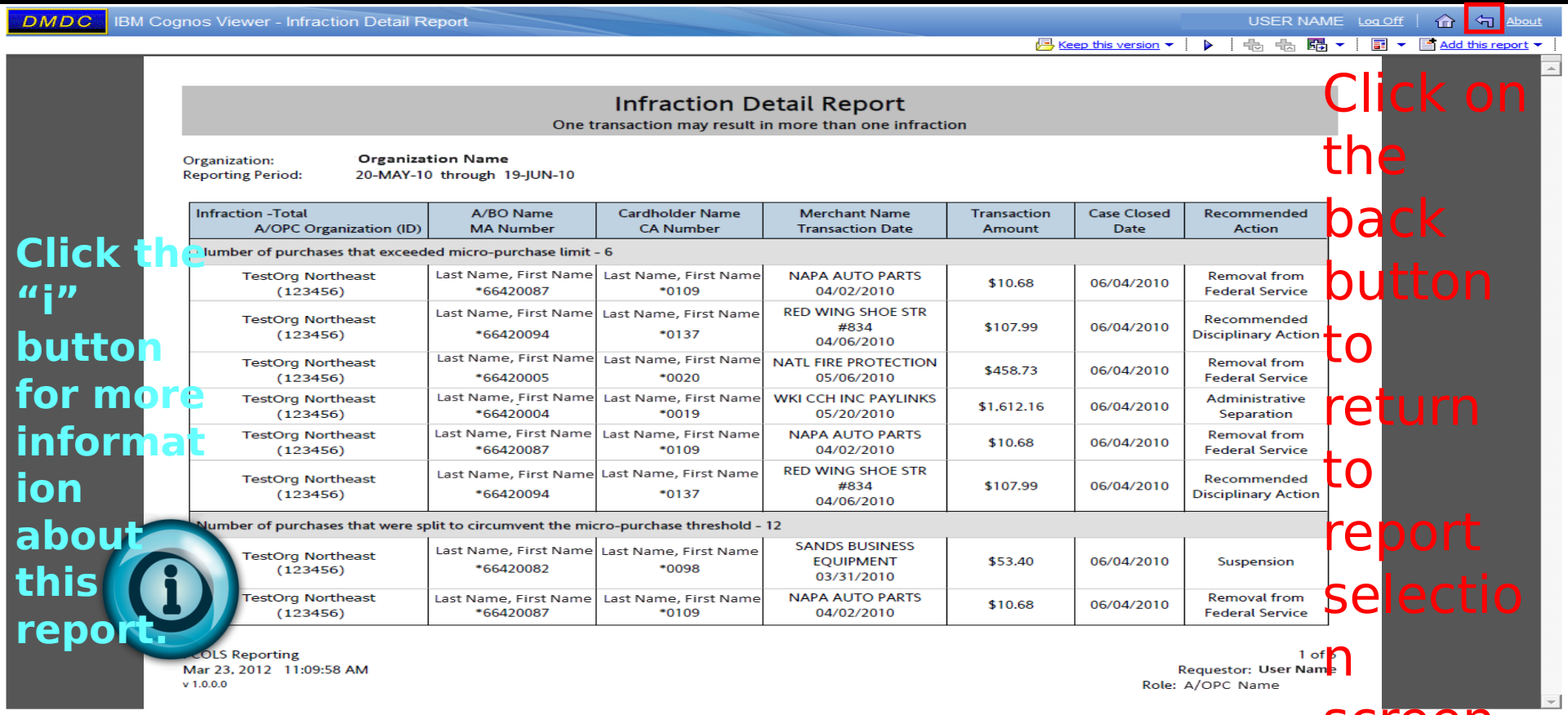
20-MAR through 19-APR-12
20-FEB-12 through 19-MAR-12
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
Run
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

Your report is running. Please wait...

Infraction Detail Report



Click the "i" button for more information about this report.

Click on the back button to return to report selection screen.

The report has been generated. The report includes all infractions from cases with a disposition and a transaction date within the reporting period.

Infraction Detail Report

The **benefits** of running this report:

- Determine what infractions occurred, such as Split Payments, Lack of Adequate Source Documentation, no consideration for Green Procurement, etc.

- Quickly find patterns of infractions where corrective action is required

Scenario: The A/OPC frequently completes Independent Reviews on High Risk Transactions and may already be aware of a majority of this information. Not all transactions are High Risk and this report will provide the A/OPC as well as higher level roles details on infractions for all closed case. This provides additional internal controls within their GPC program.

Managing Account Review Report

Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Annual Review of Managing Accounts Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Review Date Period
Past Due Accounts
Enter Begin and End Dates
Click either Past Due Accounts to include all accounts with past due reviews or Enter Begin and End Dates for reviews due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view reviews that are due.
Run
Cancel

You are at the Selection Criteria screen. You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select "Organization 2."

Managing Account Review Report

Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Annual Review of Managing Accounts Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Review Date Period
Past Due Accounts
Enter Begin and End Dates
Click either Past Due Accounts to include all accounts with past due reviews or Enter Begin and End Dates for reviews due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view reviews that are due.
Run
Cancel

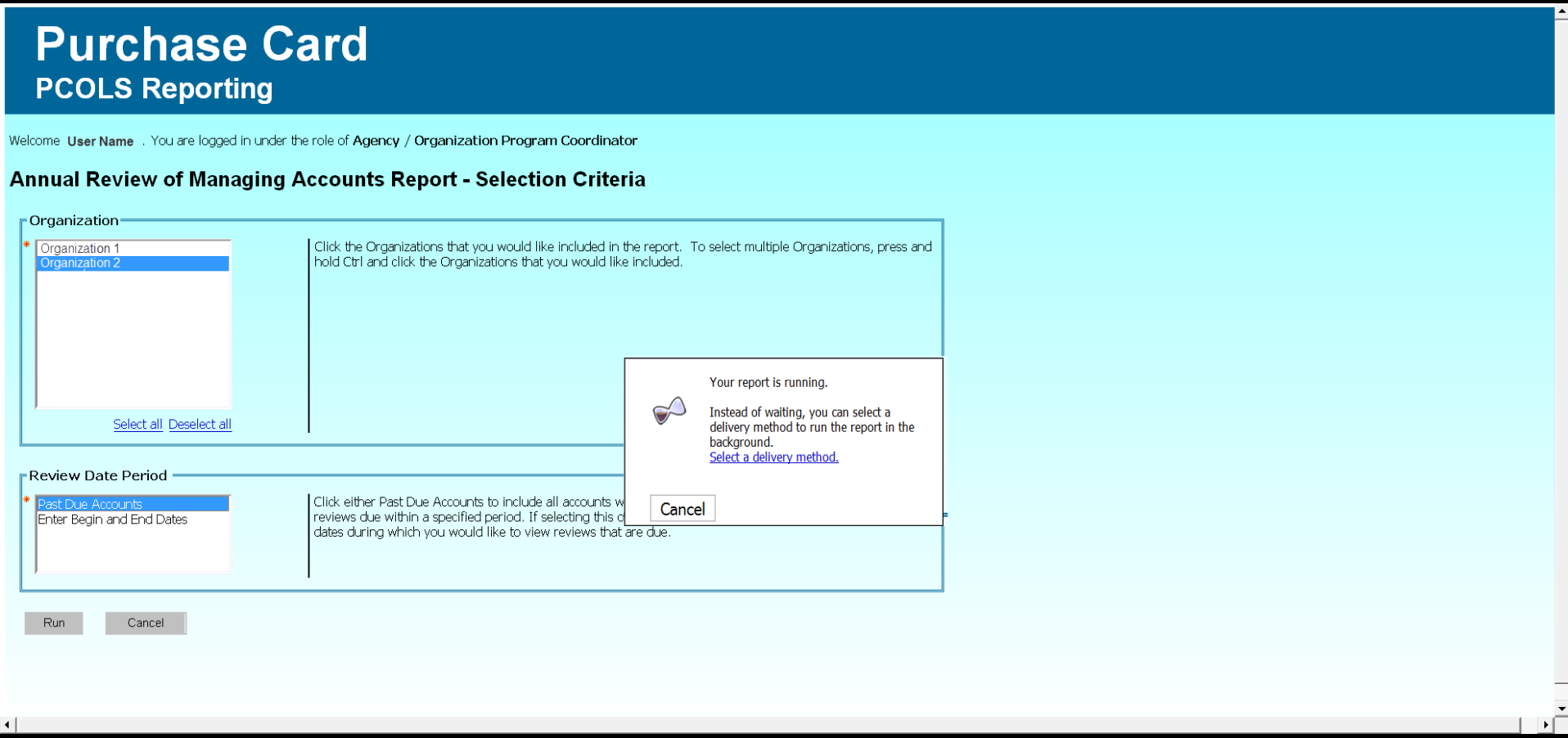
Select “Past Due Accounts” or “Enter Begin and End Dates.”

Managing Account Review Report

Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Annual Review of Managing Accounts Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Review Date Period
Past Due Accounts
Enter Begin and End Dates
Click either Past Due Accounts to include all accounts with past due reviews or Enter Begin and End Dates for reviews due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view reviews that are due.
Run
Cancel

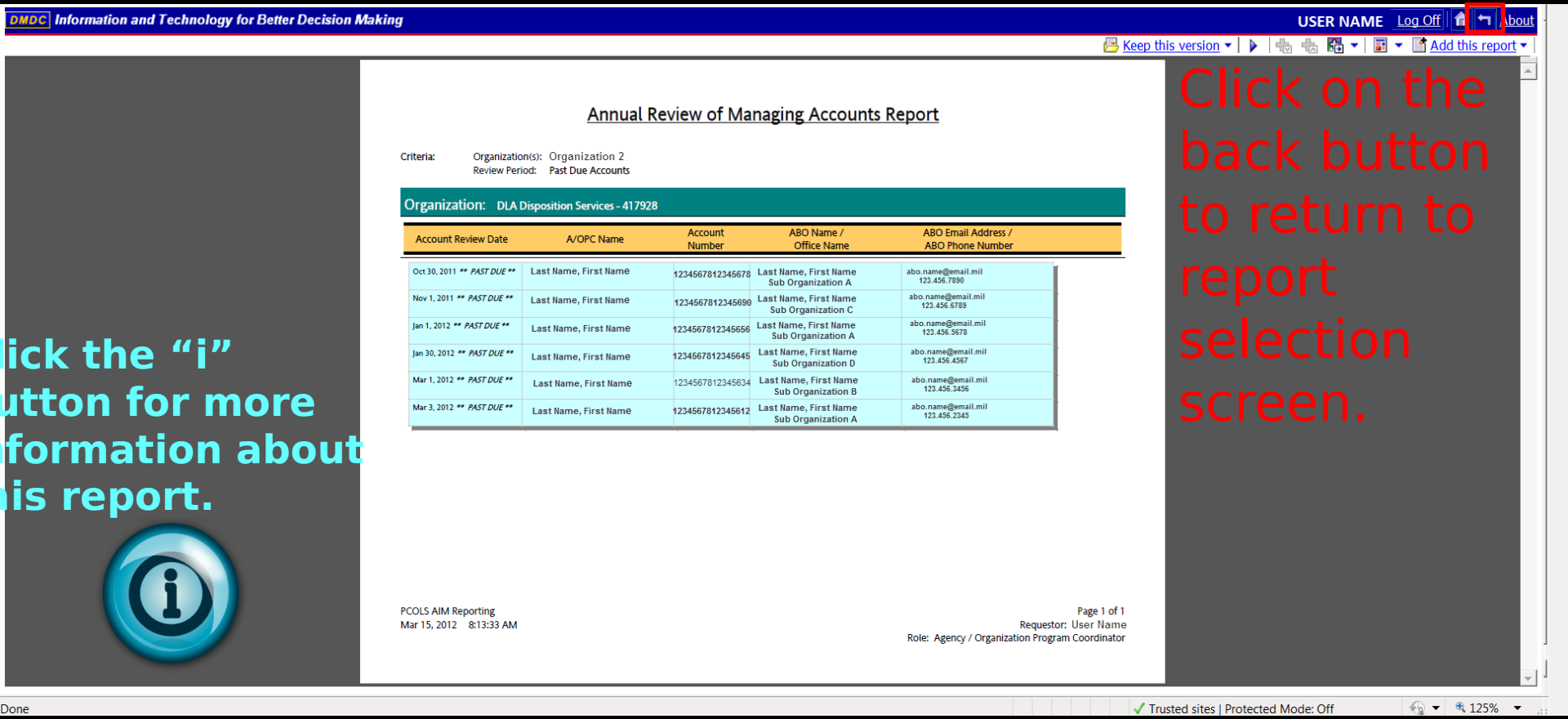
All required criteria has been selected. Click the “Run” button.

Managing Account Review Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Annual Review of Managing Accounts Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Review Date Period
Past Due Accounts
Enter Begin and End Dates
Click either Past Due Accounts to include all accounts w
reviews due within a specified period. If selecting this o
dates during which you would like to view reviews that are due.
Run
Cancel

Your report is running. Please wait.

Managing Account Review Report



lick the "i" utton for more formation about is report.

Click on the back button to return to report selection screen.

The report has been generated. The report details a list of individuals with past due account review dates. These dates were entered into AIM by the A/OPC when they issued the Managing Account

Managing Account Review Report

The **benefits** of running this report:

- Determine what upcoming reviews will need to be completed

- Display any managing account reviews that are past due

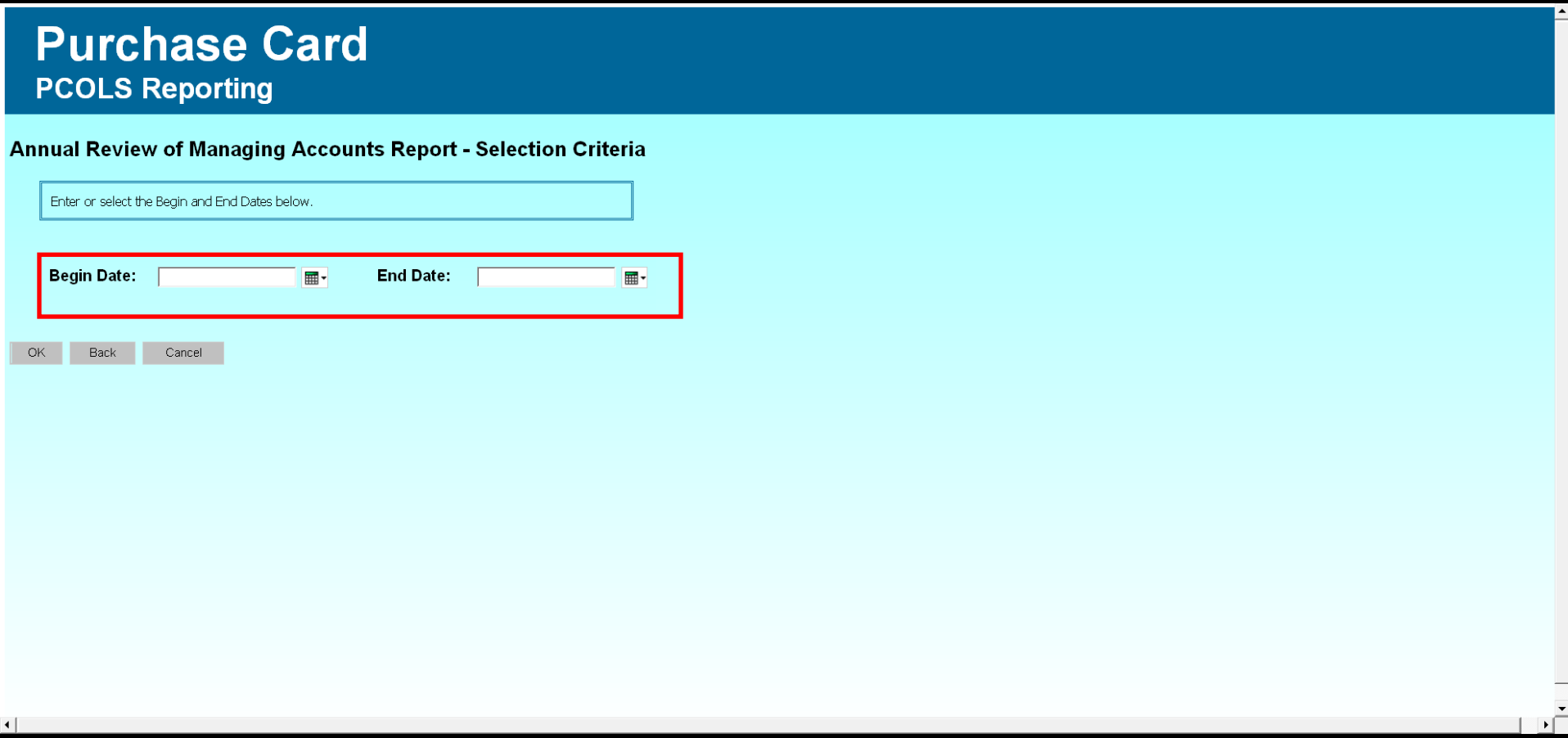
Scenario: The A/OPC receives a PCOLS system notification email 60 days and 30 days before a review is due. An email is also sent on the actual Managing Account Review date indicating that it is past due. This report is run as an additional tool to help the A/OPC track the annual review date for their managing accounts, verifying that all Managing Account reviews are current.

Managing Account Review Report

Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Annual Review of Managing Accounts Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Review Date Period
Past Due Accounts
Enter Begin and End Dates
Click either Past Due Accounts to include all accounts with past due reviews or Enter Begin and End Dates for reviews due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view reviews that are due.
Run
Cancel

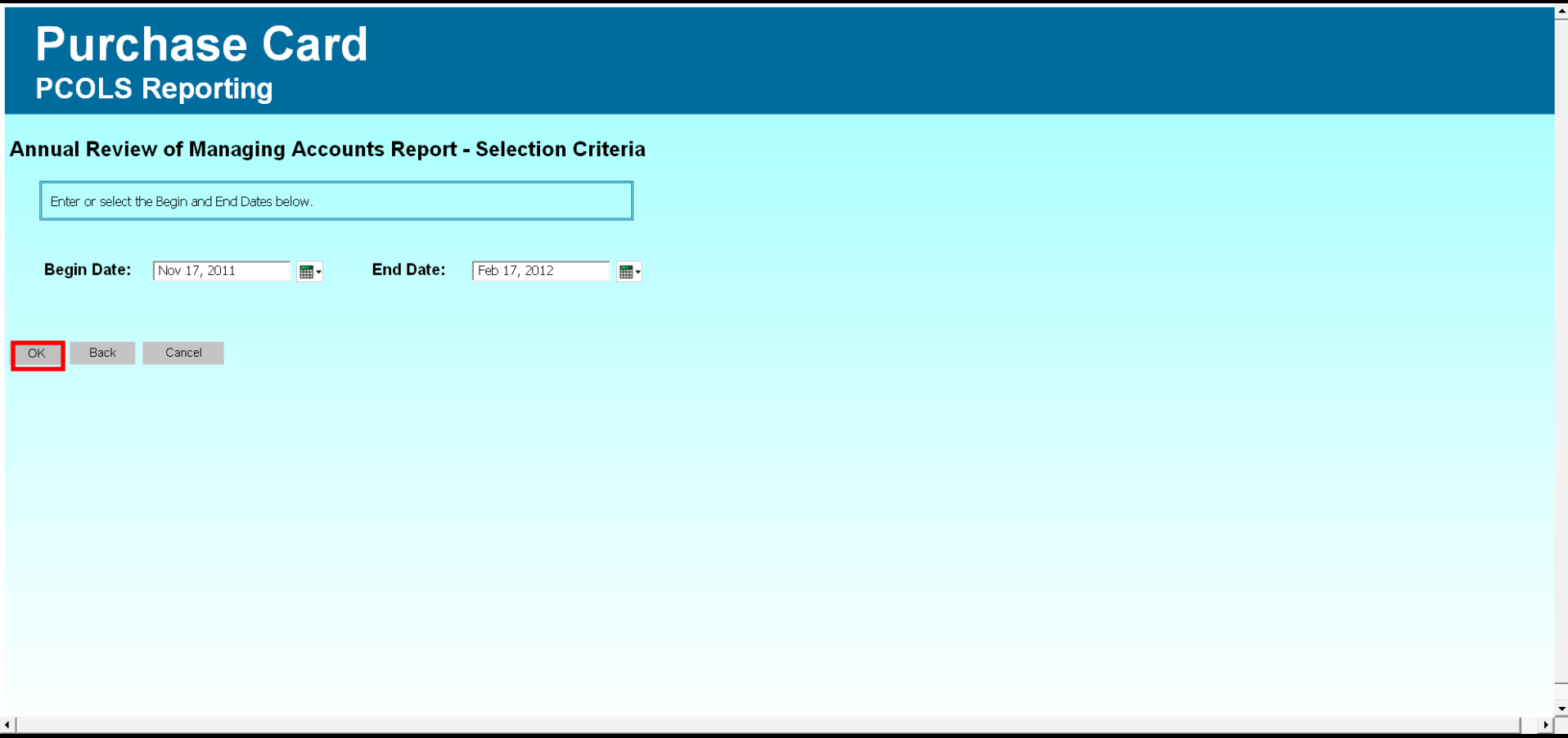
All required criteria has been selected. Click the “Run” button.

Managing Account Review Report



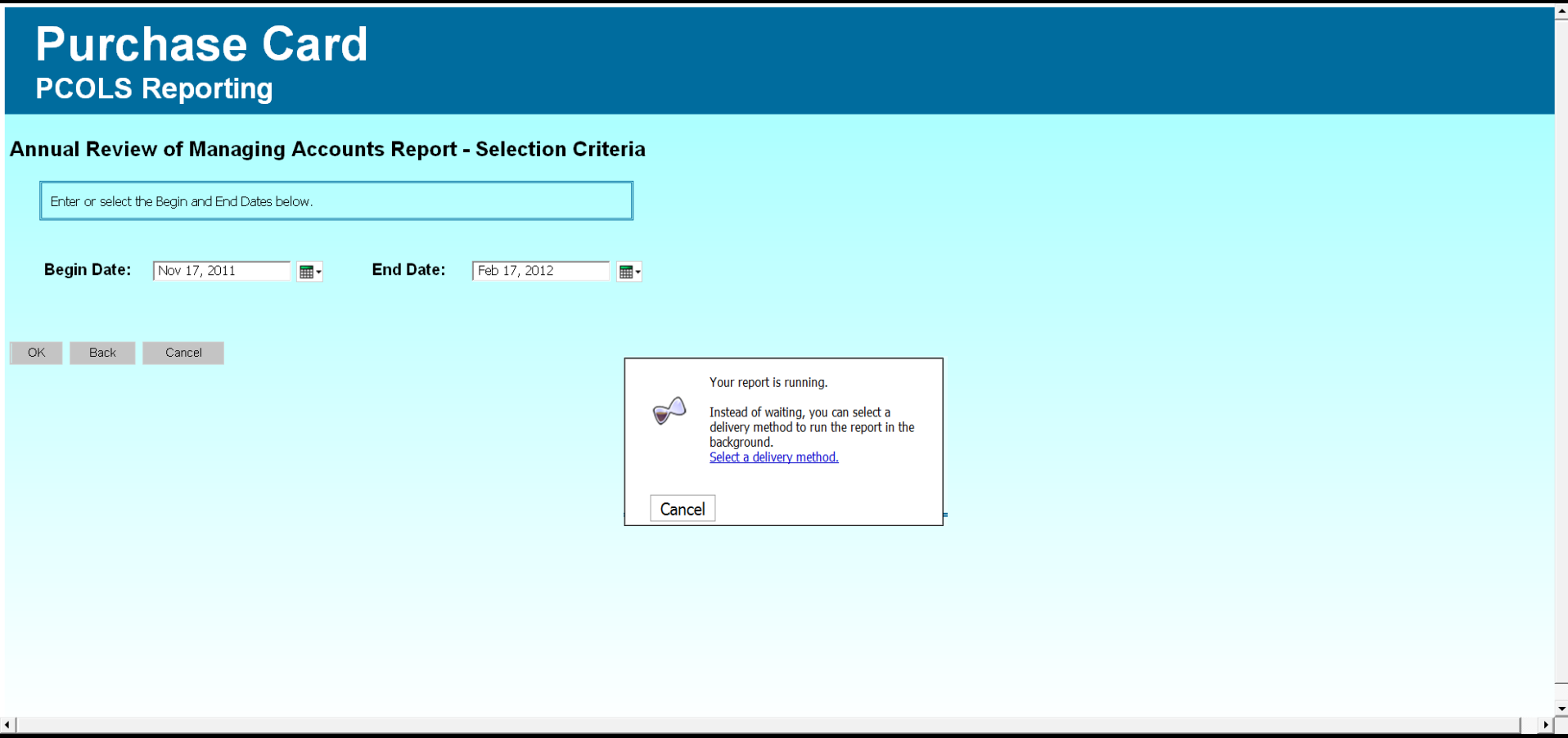
A Begin Date and End Date is required. Click in on the Begin/End Date fields to add at date range.

Managing Account Review Report



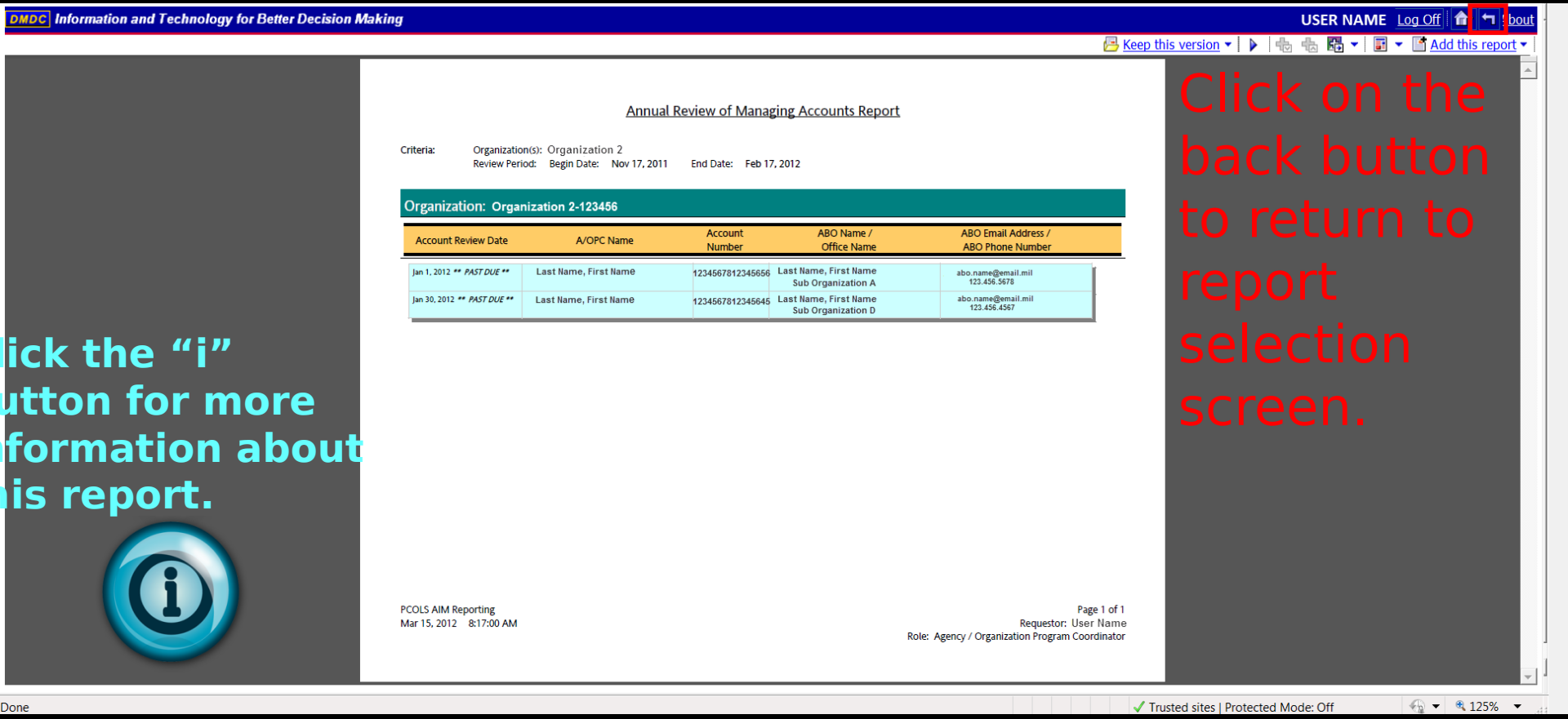
All required criteria has been selected. Click the “OK” button.

Managing Account Review Report


Purchase Card
PCOLS Reporting
Annual Review of Managing Accounts Report - Selection Criteria
Enter or select the Begin and End Dates below.
Begin Date:
Nov 17, 2011
End Date:
Feb 17, 2012
OK
Back
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

Your report is running. Please wait.

Managing Account Review Report



lick the “i” utton for more formation about is report.

Click on the back button to return to report selection screen.

The report has been generated. The report details a list of individuals with past due account review dates in the selected date range.

Managing Account Review Report

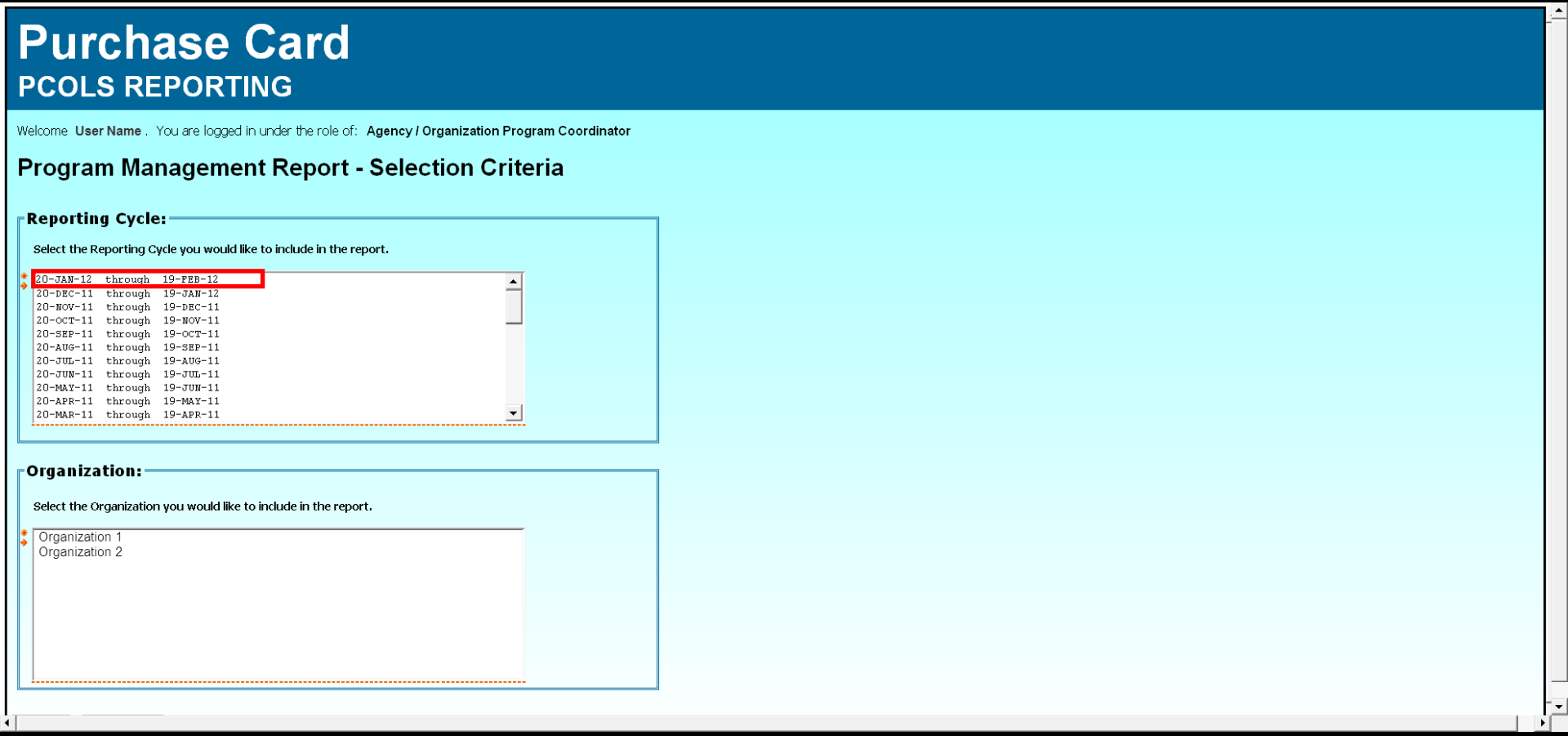
The **benefits** of running this report:

- Determine what upcoming reviews will need to be completed

- Display any managing account reviews that are past due

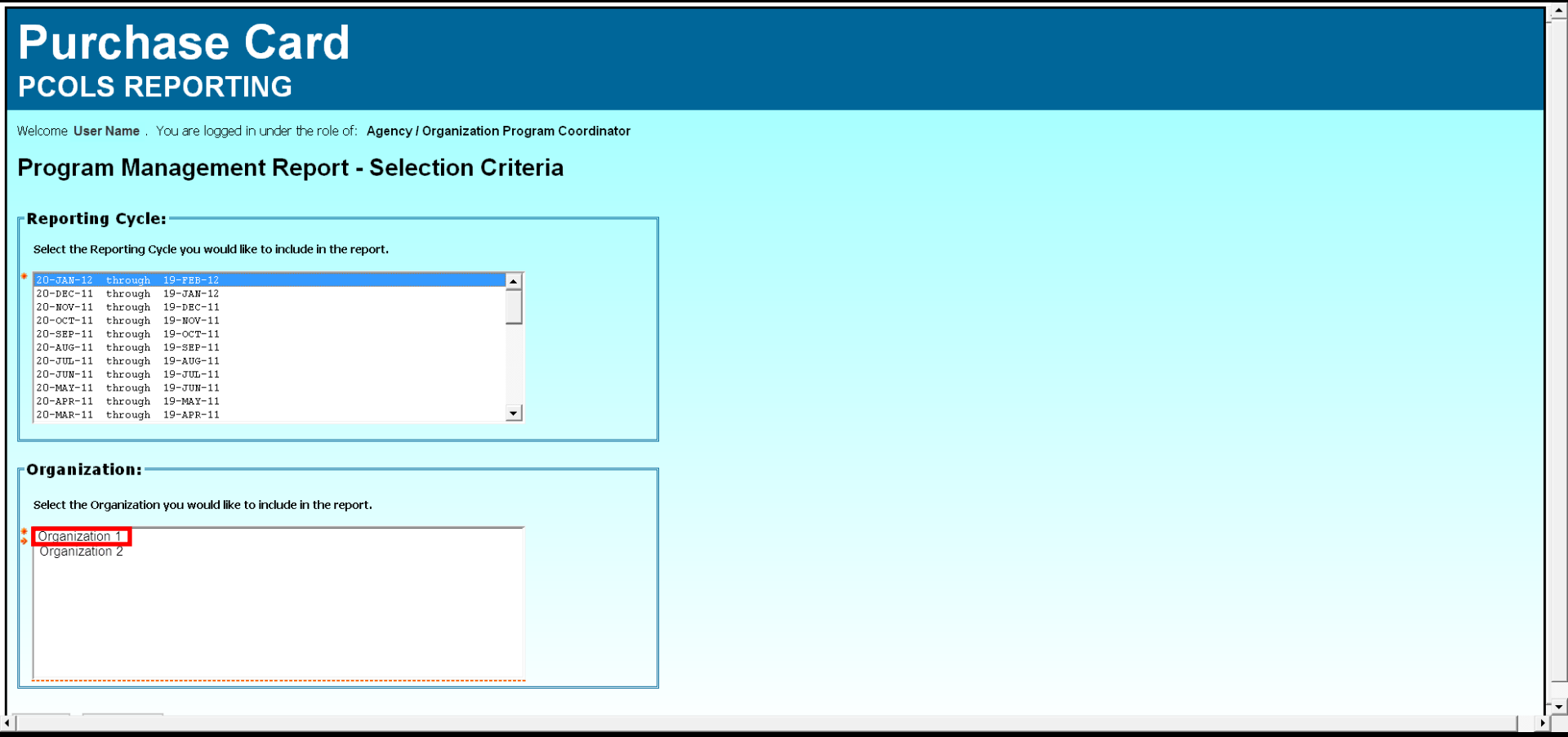
Scenario: The A/OPC receives a PCOLS system notification email 60 days and 30 days before a review is due. An email is also sent on the actual Managing Account Review date indicating that it is past due. This report is run as an additional tool to help the A/OPC track the annual review date for their managing accounts, verifying that all Managing Account reviews are current.

Program Management Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Program Management Report - Selection Criteria
Reporting Cycle:
Select the Reporting Cycle you would like to include in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Organization:
Select the Organization you would like to include in the report.
Organization 1
Organization 2

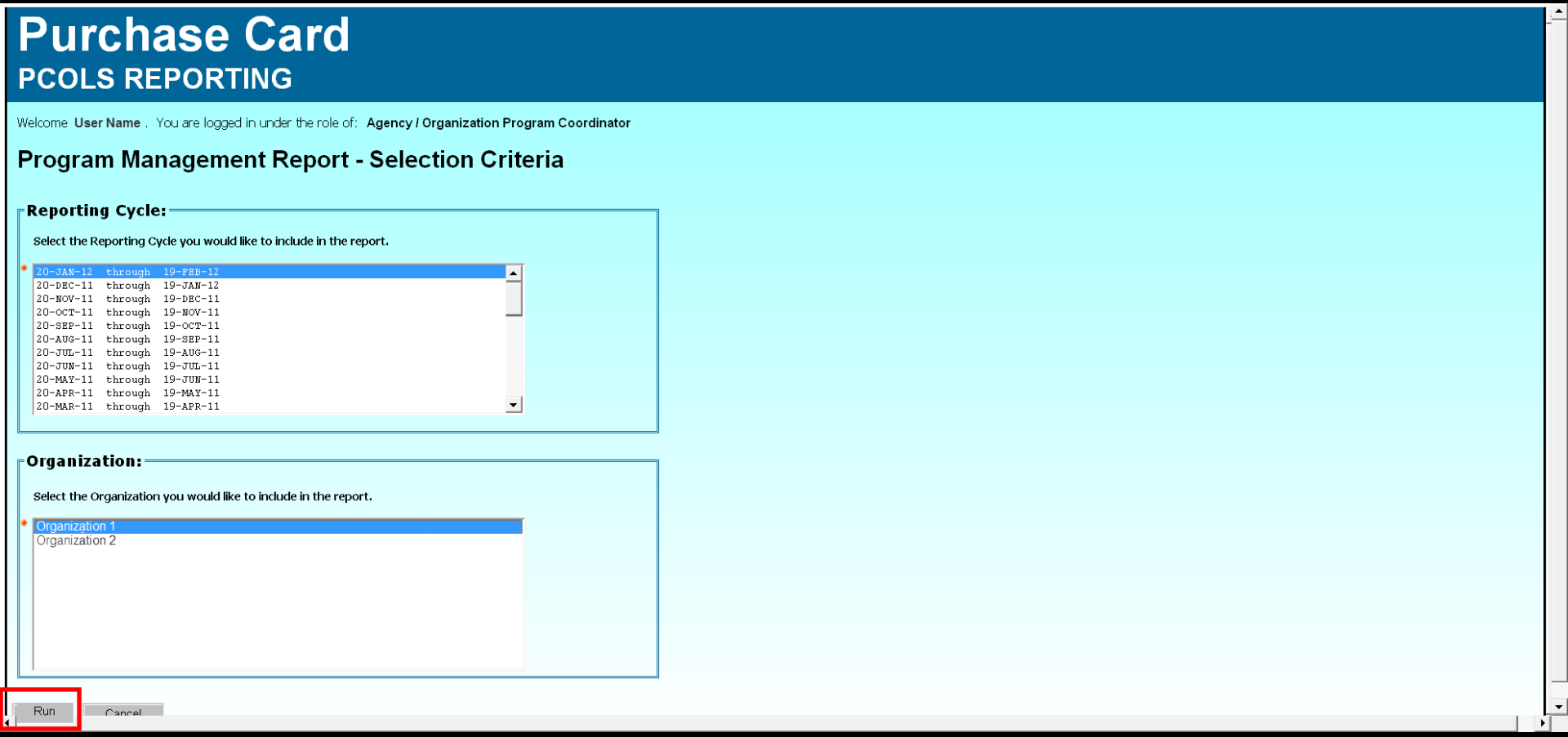
You are at the Selection Criteria screen . You will need to select the reporting cycle you would like included in the report. Select the “20-Jan-12 through 19-Feb-12” Reporting Cycle

Program Management Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Program Management Report - Selection Criteria
Reporting Cycle:
Select the Reporting Cycle you would like to include in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Organization:
Select the Organization you would like to include in the report.
Organization 1
Organization 2

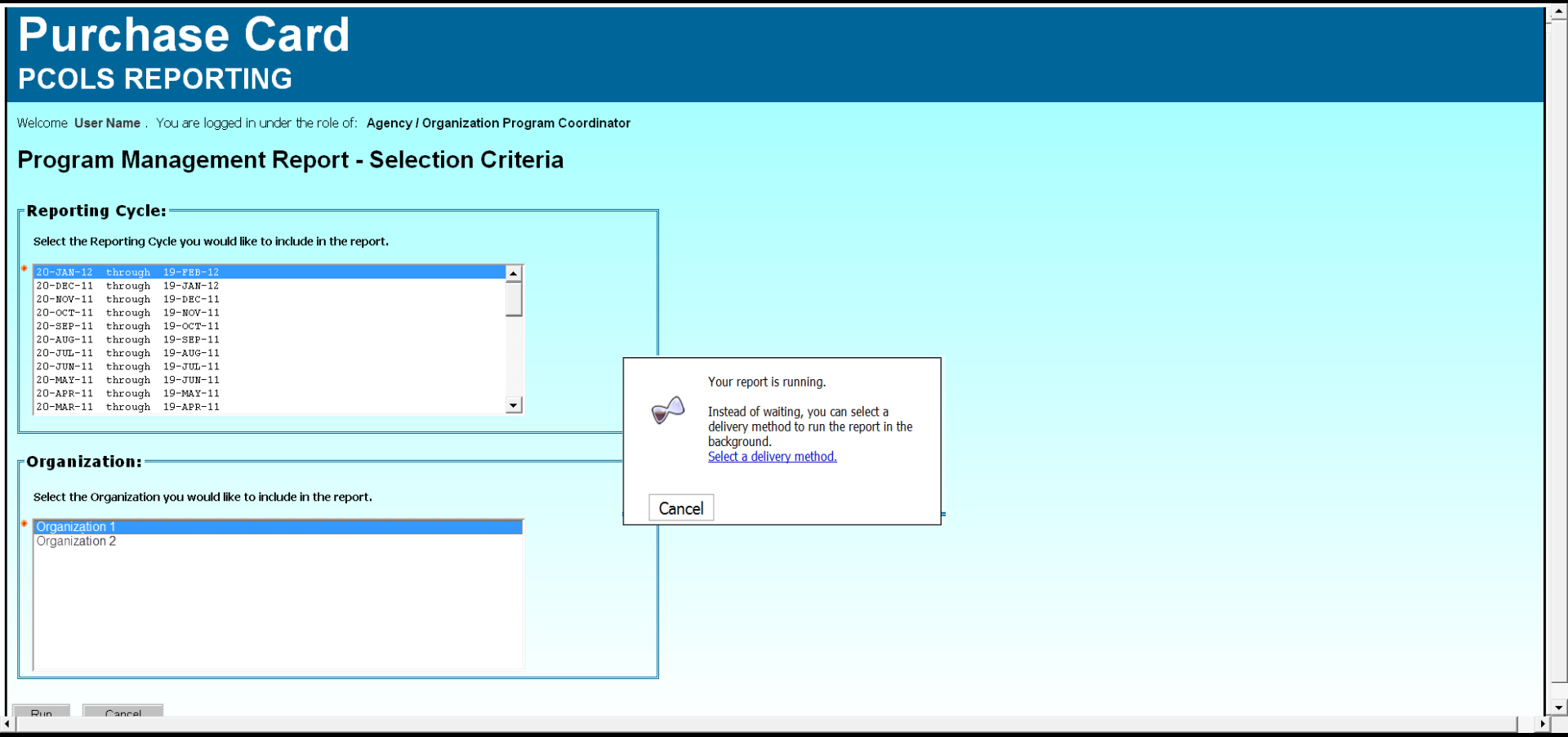
You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Program Management Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Program Management Report - Selection Criteria
Reporting Cycle:
Select the Reporting Cycle you would like to include in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Organization:
Select the Organization you would like to include in the report.
Organization 1
Organization 2
Run
Cancel

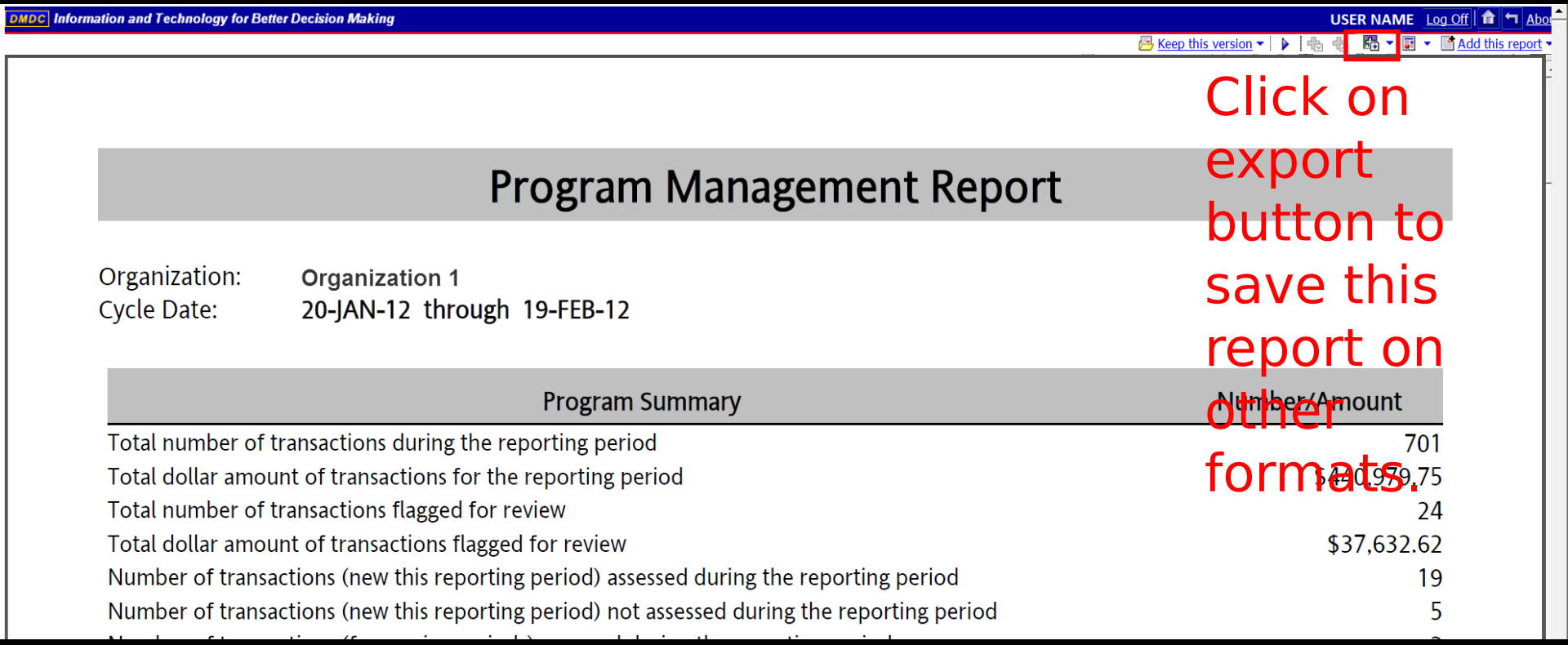
All required criteria has been selected. Click the “Run” button.

Program Management Report


Purchase Card
PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Program Management Report - Selection Criteria
Reporting Cycle:
Select the Reporting Cycle you would like to include in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Organization:
Select the Organization you would like to include in the report.
Organization 1
Organization 2
Run
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

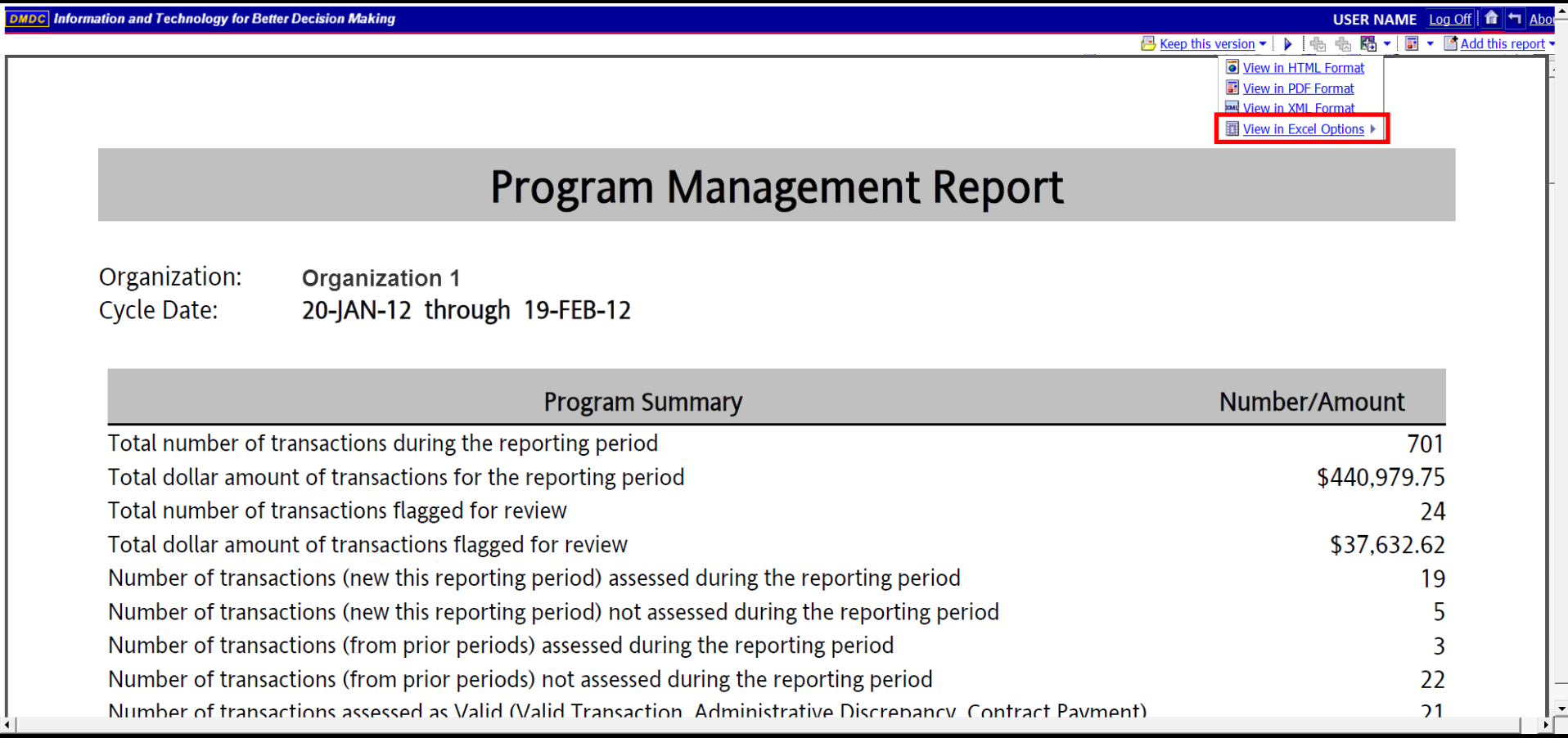
Your report is running. Please wait.

Program Management Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
Program Management Report
Organization: Organization 1
Cycle Date: 20-JAN-12 through 19-FEB-12
Program Summary
Number/Amount
Total number of transactions during the reporting period 701
Total dollar amount of transactions for the reporting period $440,979.75
Total number of transactions flagged for review 24
Total dollar amount of transactions flagged for review $37,632.62
Number of transactions (new this reporting period) assessed during the reporting period 19
Number of transactions (new this reporting period) not assessed during the reporting period 5
Click on export button to save this report on other formats.

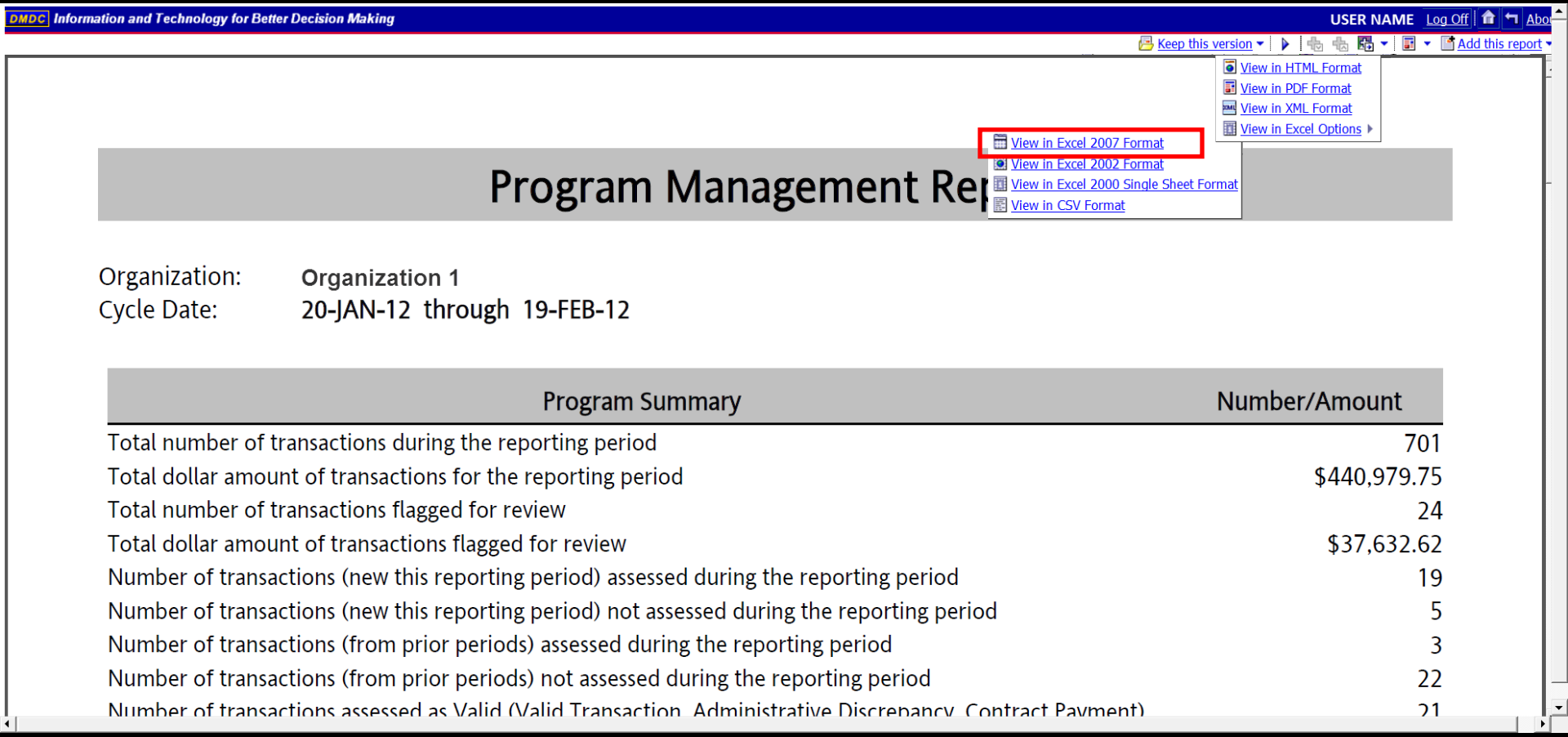
The report has been generated. The report details 5 sections for a particular organization during one bank cycle. The sections include: Program Summary, Monthly Account Review, Report Card/Program Health, Case Disposition, and Infraction Category. To generate this

Program Management Report


DMDC Information and Technology for Better Decision Making
USER NAME
Log Off
Keep this version
Add this report
View in HTML Format
View in PDF Format
View in XML Format
View in Excel Options
Program Management Report
Organization: Organization 1
Cycle Date: 20-JAN-12 through 19-FEB-12
Program Summary
Number/Amount
Total number of transactions during the reporting period
701
Total dollar amount of transactions for the reporting period
$440,979.75
Total number of transactions flagged for review
24
Total dollar amount of transactions flagged for review
$37,632.62
Number of transactions (new this reporting period) assessed during the reporting period
19
Number of transactions (new this reporting period) not assessed during the reporting period
5
Number of transactions (from prior periods) assessed during the reporting period
3
Number of transactions (from prior periods) not assessed during the reporting period
22

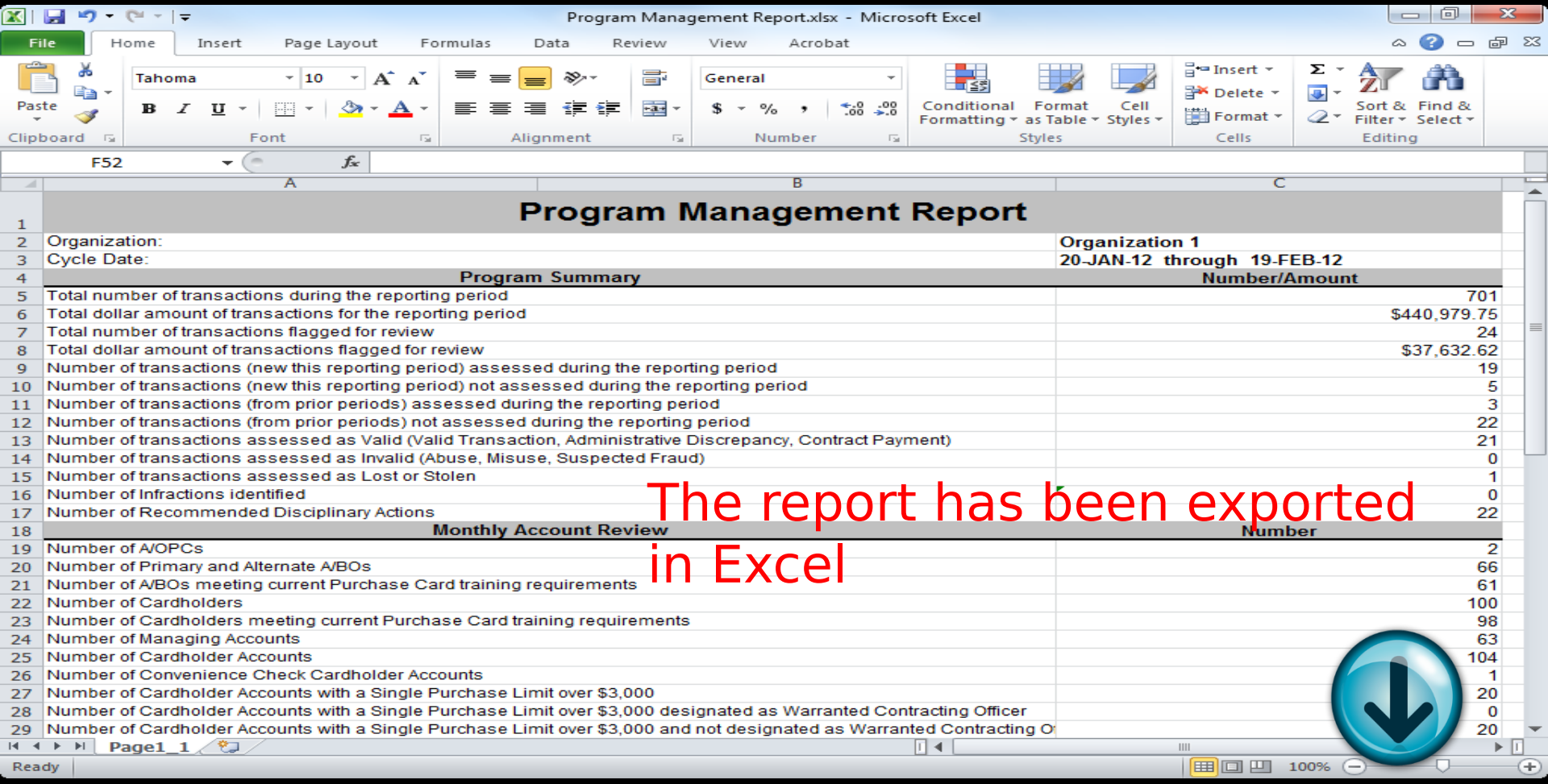
A drop down menu is displayed. Click on View in Excel Options.

Program Management Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
View in HTML Format
View in PDF Format
View in XML Format
View in Excel Options
View in Excel 2007 Format
View in Excel 2002 Format
View in Excel 2000 Single Sheet Format
View in CSV Format
Program Management Rep
Organization: Organization 1
Cycle Date: 20-JAN-12 through 19-FEB-12
Program Summary | Number/Amount
Total number of transactions during the reporting period | 701
Total dollar amount of transactions for the reporting period | $440,979.75
Total number of transactions flagged for review | 24
Total dollar amount of transactions flagged for review | $37,632.62
Number of transactions (new this reporting period) assessed during the reporting period | 19
Number of transactions (new this reporting period) not assessed during the reporting period | 5
Number of transactions (from prior periods) assessed during the reporting period | 3
Number of transactions (from prior periods) not assessed during the reporting period | 22
Number of transactions assessed as Valid (Valid Transaction, Administrative Discrepancy, Contract Payment) | 21

An additional drop down menu is displayed. Click on View in Excel 2007 Format.

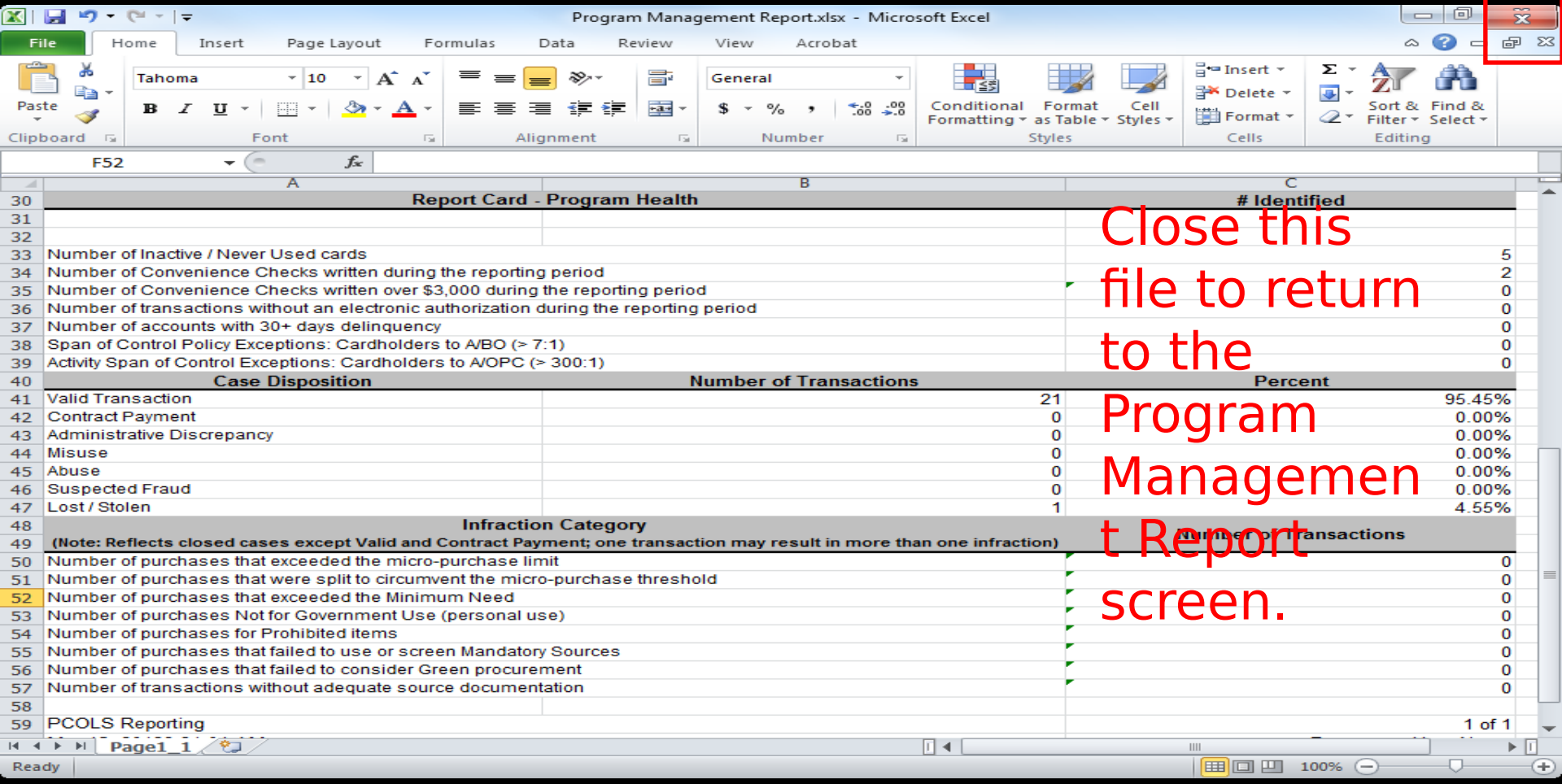
Program Management Report



The report has been exported in Excel

The Program Summary section gives high level totals for the number of transactions. The Monthly Account Review provide totals for the number of provisioned users.

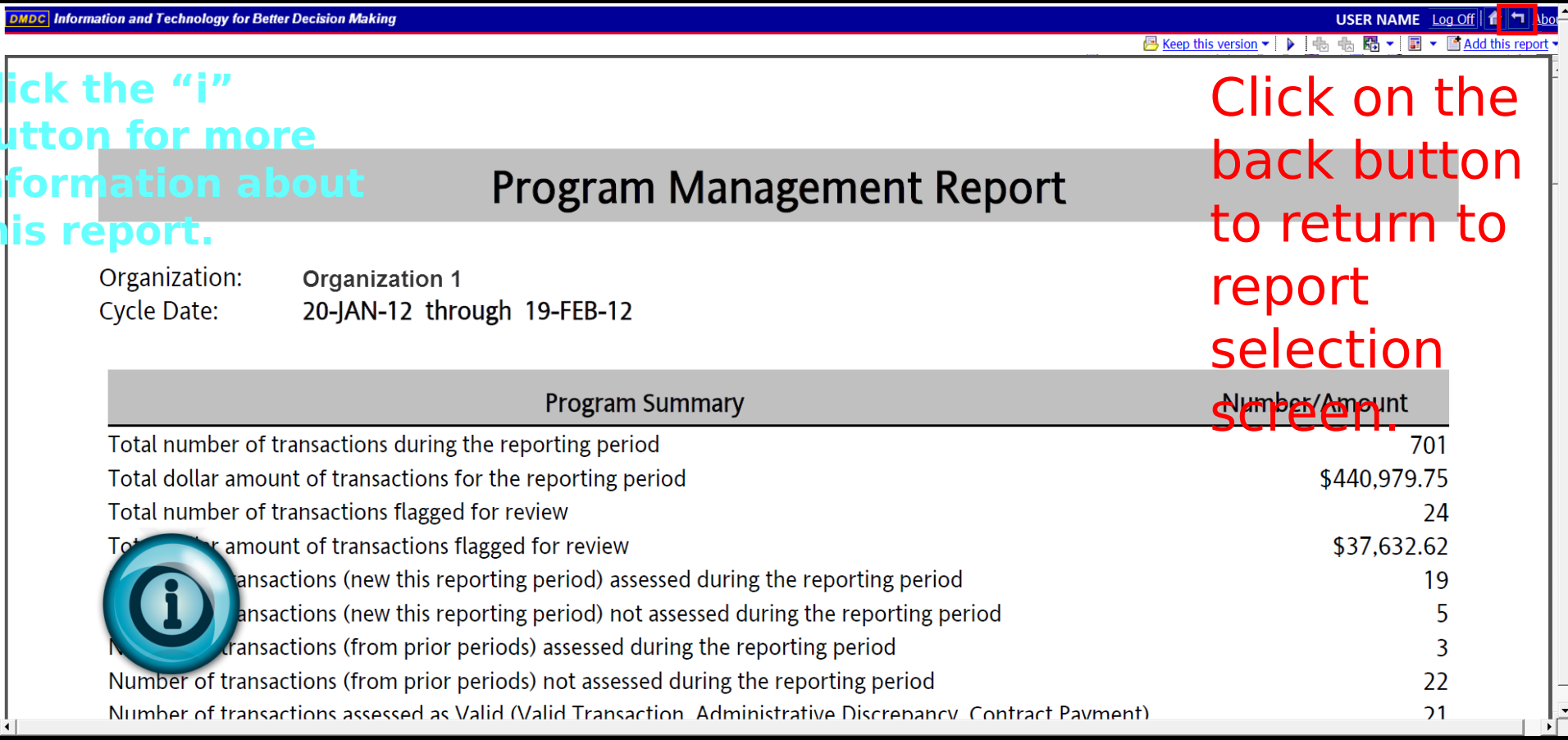
Program Management Report



	A	B	C
30	**Report Card - Program Health**		**# Identified**
31			
32			
33	Number of Inactive / Never Used cards		5
34	Number of Convenience Checks written during the reporting period		2
35	Number of Convenience Checks written over $3,000 during the reporting period		0
36	Number of transactions without an electronic authorization during the reporting period		0
37	Number of accounts with 30+ days delinquency		0
38	Span of Control Policy Exceptions: Cardholders to A/BO (> 7:1)		0
39	Activity Span of Control Exceptions: Cardholders to A/OPC (> 300:1)		0
40	**Case Disposition**	**Number of Transactions**	**Percent**
41	Valid Transaction	21	95.45%
42	Contract Payment	0	0.00%
43	Administrative Discrepancy	0	0.00%
44	Misuse	0	0.00%
45	Abuse	0	0.00%
46	Suspected Fraud	0	0.00%
47	Lost / Stolen	1	4.55%
48	**Infraction Category**		**Number of Transactions**
49	**(Note: Reflects closed cases except Valid and Contract Payment; one transaction may result in more than one infraction)**		
50	Number of purchases that exceeded the micro-purchase limit		0
51	Number of purchases that were split to circumvent the micro-purchase threshold		0
52	Number of purchases that exceeded the Minimum Need		0
53	Number of purchases Not for Government Use (personal use)		0
54	Number of purchases for Prohibited items		0
55	Number of purchases that failed to use or screen Mandatory Sources		0
56	Number of purchases that failed to consider Green procurement		0
57	Number of transactions without adequate source documentation		0
58			
59	PCOLS Reporting		1 of 1

The Report Card/Program Health section displays potential concerns with transactions and accounts. The Case Disposition and the Infraction Category sections

Program Management Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
ick the "i"
utton for more
formation about
is report.
Program Management Report
Organization: Organization 1
Cycle Date: 20-JAN-12 through 19-FEB-12
Program Summary
Number/Amount
Total number of transactions during the reporting period 701
Total dollar amount of transactions for the reporting period $440,979.75
Total number of transactions flagged for review 24
amount of transactions flagged for review $37,632.62
ansactions (new this reporting period) assessed during the reporting period 19
ansactions (new this reporting period) not assessed during the reporting period 5
ransactions (from prior periods) assessed during the reporting period 3
Number of transactions (from prior periods) not assessed during the reporting period 22
Number of transactions assessed as Valid (Valid Transaction, Administrative Discrepancy, Contract Payment) 21
Click on the back button to return to report selection screen.

Click on the home button to return to the Report Selection screen.

Program Management Report

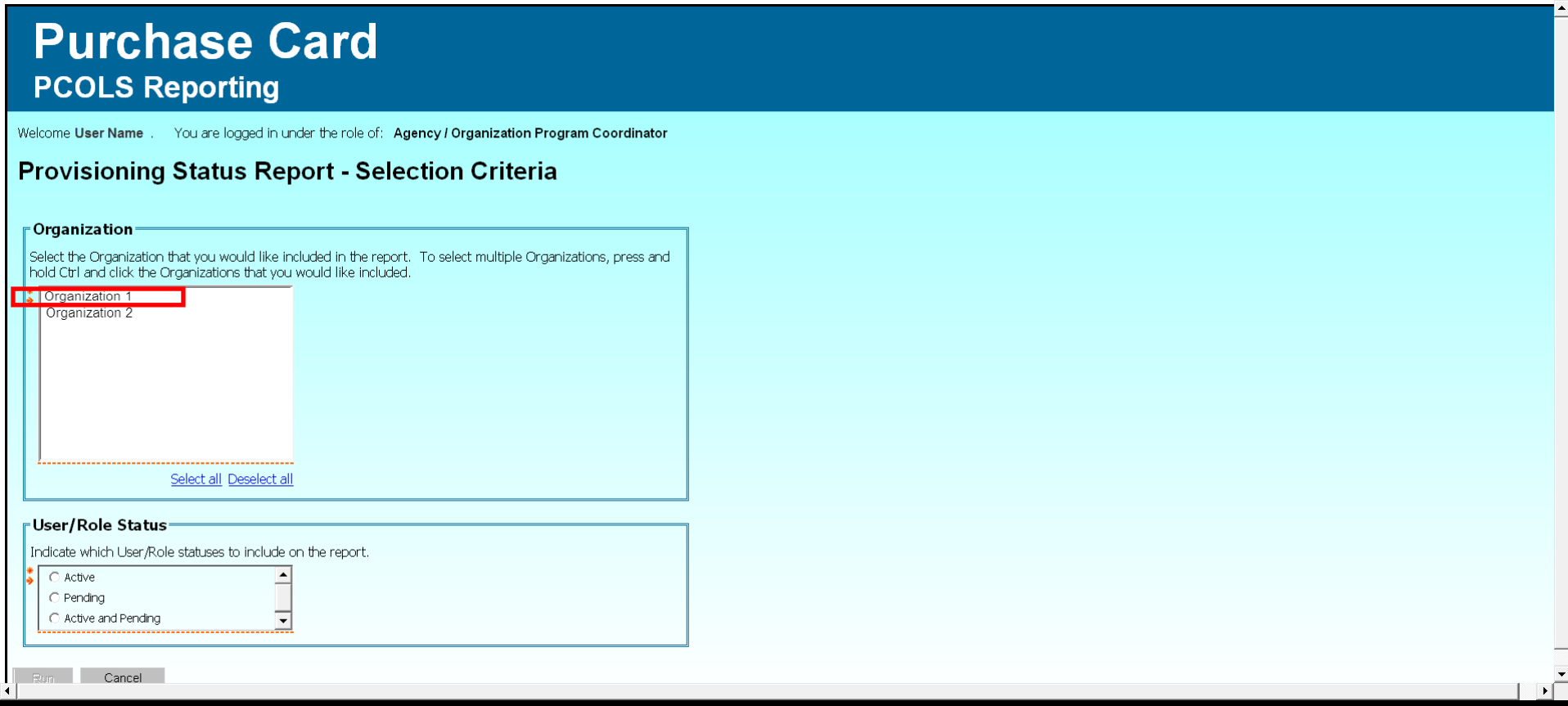
The **benefits** of running this report:

- Ability to view high level GPC data for a giving billing cycle

- Provide overall health of GPC program

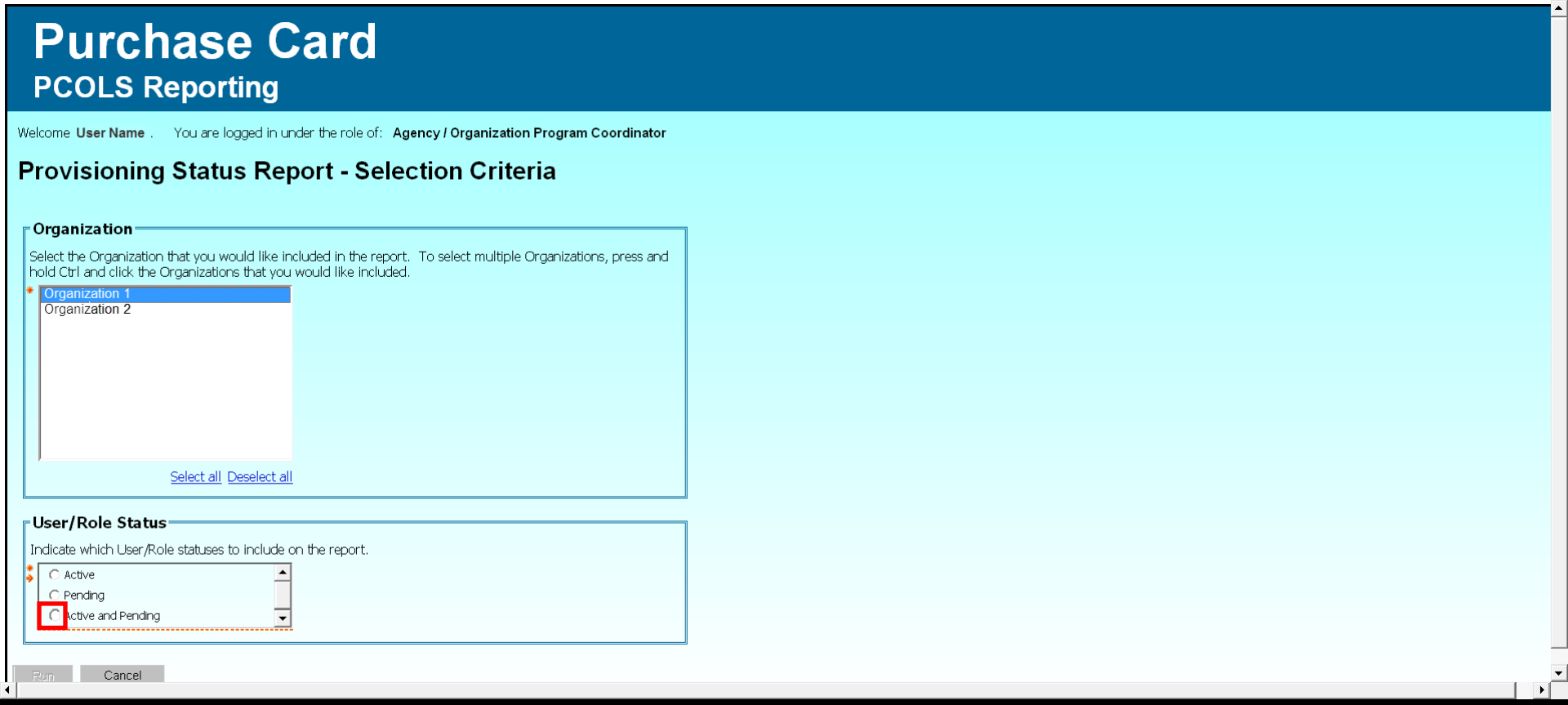
Scenario: The A/OPC has access to run this report, but it is generally utilized by higher level roles such as A/OPC Supervisor, HCA, AEA, and the PCPO. A variety of information related to potential concerns with transactions or accounts can be reviewed from the data presented in the report. High level users find this report to be important as it is a snapshot of the overall health of their GPC program.

Provisioning Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Provisioning Status Report - Selection Criteria
Organization
Select the Organization that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Organization 1
Organization 2
Select all Deselect all
User/Role Status
Indicate which User/Role statuses to include on the report.
Active
Pending
Active and Pending
Run
Cancel

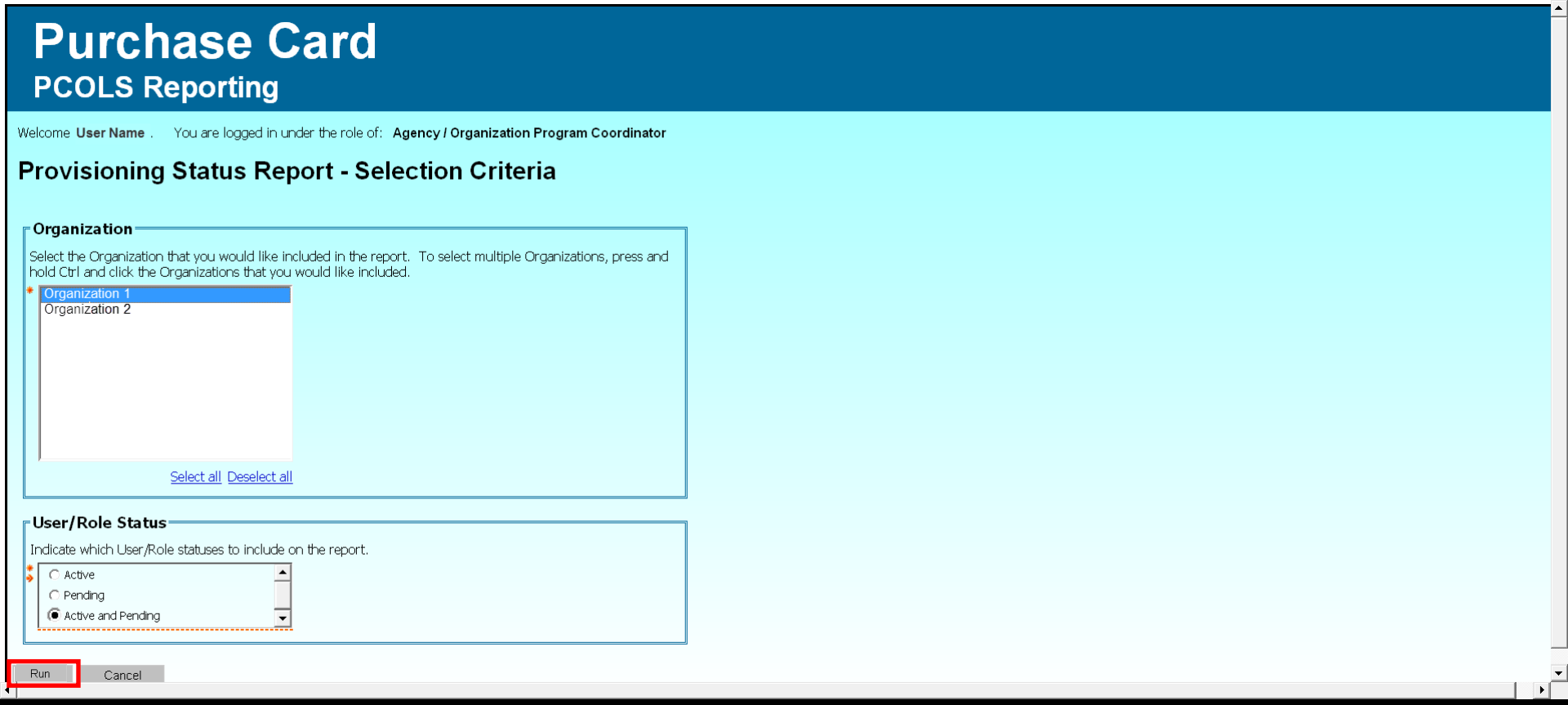
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Provisioning Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Provisioning Status Report - Selection Criteria
Organization
Select the Organization that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Organization 1
Organization 2
Select all Deselect all
User/Role Status
Indicate which User/Role statuses to include on the report.
Active
Pending
Active and Pending
Run
Cancel

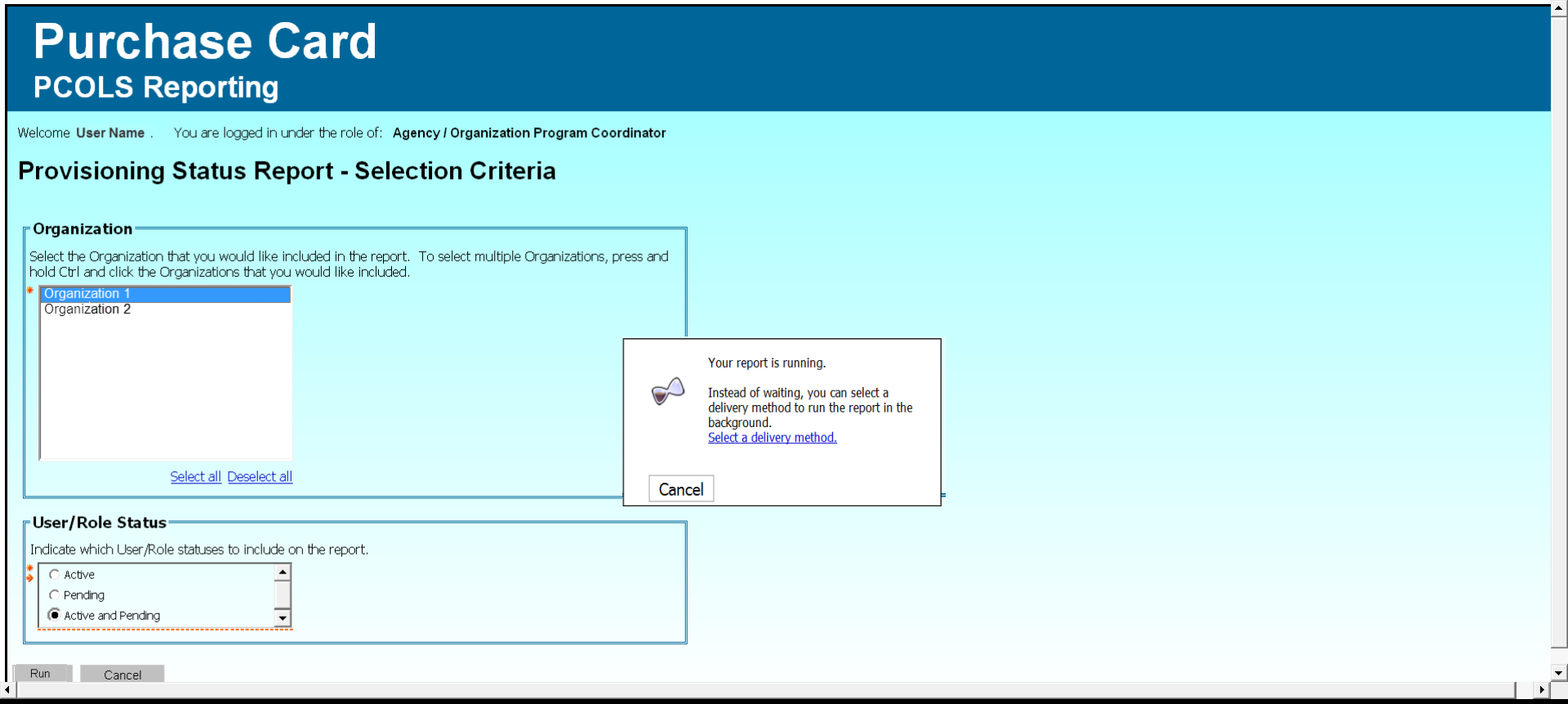
You will also need to indicate which User/Role statuses to include in the report. The options are Active, Pending, and Active and Pending. Select “Active and Pending.”

Provisioning Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Provisioning Status Report - Selection Criteria
Organization
Select the Organization that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Organization 1
Organization 2
Select all Deselect all
User/Role Status
Indicate which User/Role statuses to include on the report.
Active
Pending
Active and Pending
Run
Cancel

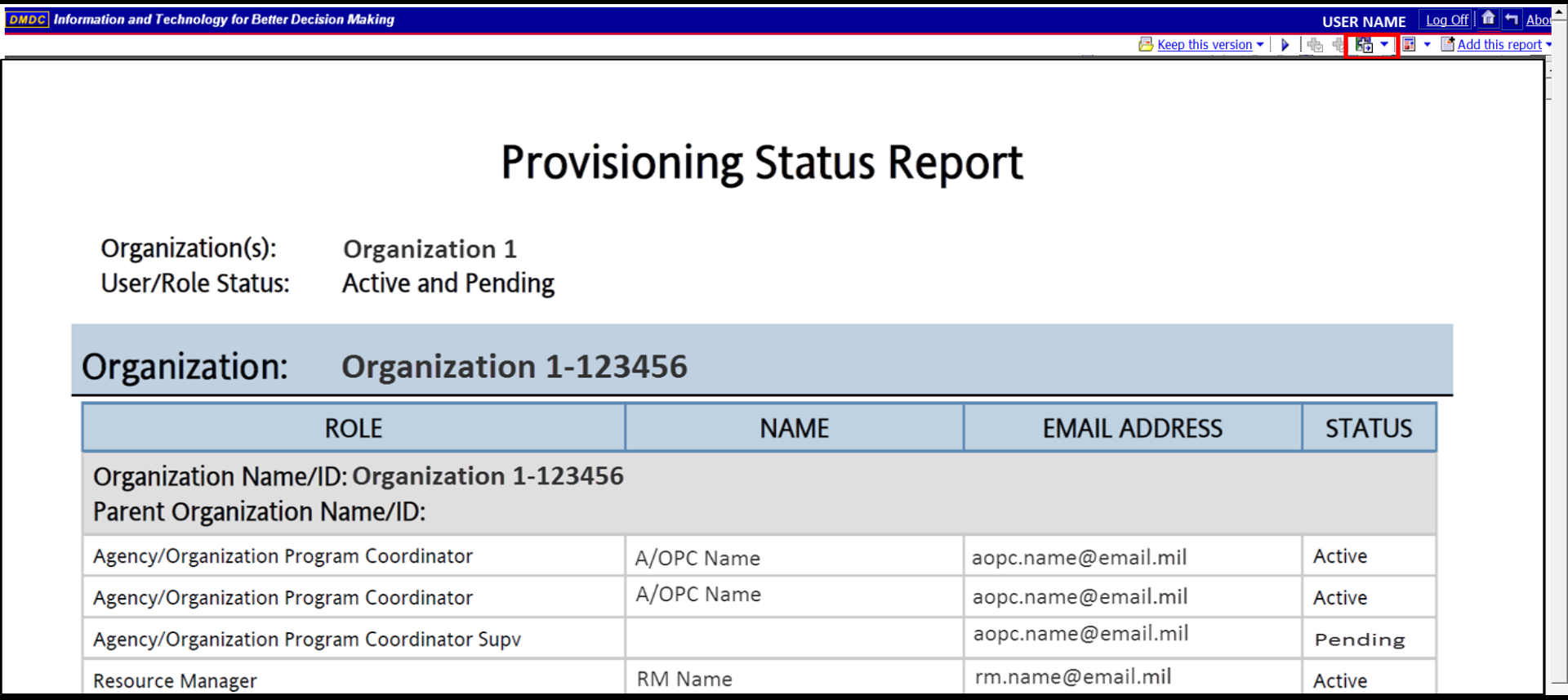
All required criteria has been selected. Click the “Run” button.

Provisioning Status Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Provisioning Status Report - Selection Criteria
Organization
Select the Organization that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Organization 1
Organization 2
Select all Deselect all
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
User/Role Status
Indicate which User/Role statuses to include on the report.
Active
Pending
Active and Pending
Run
Cancel

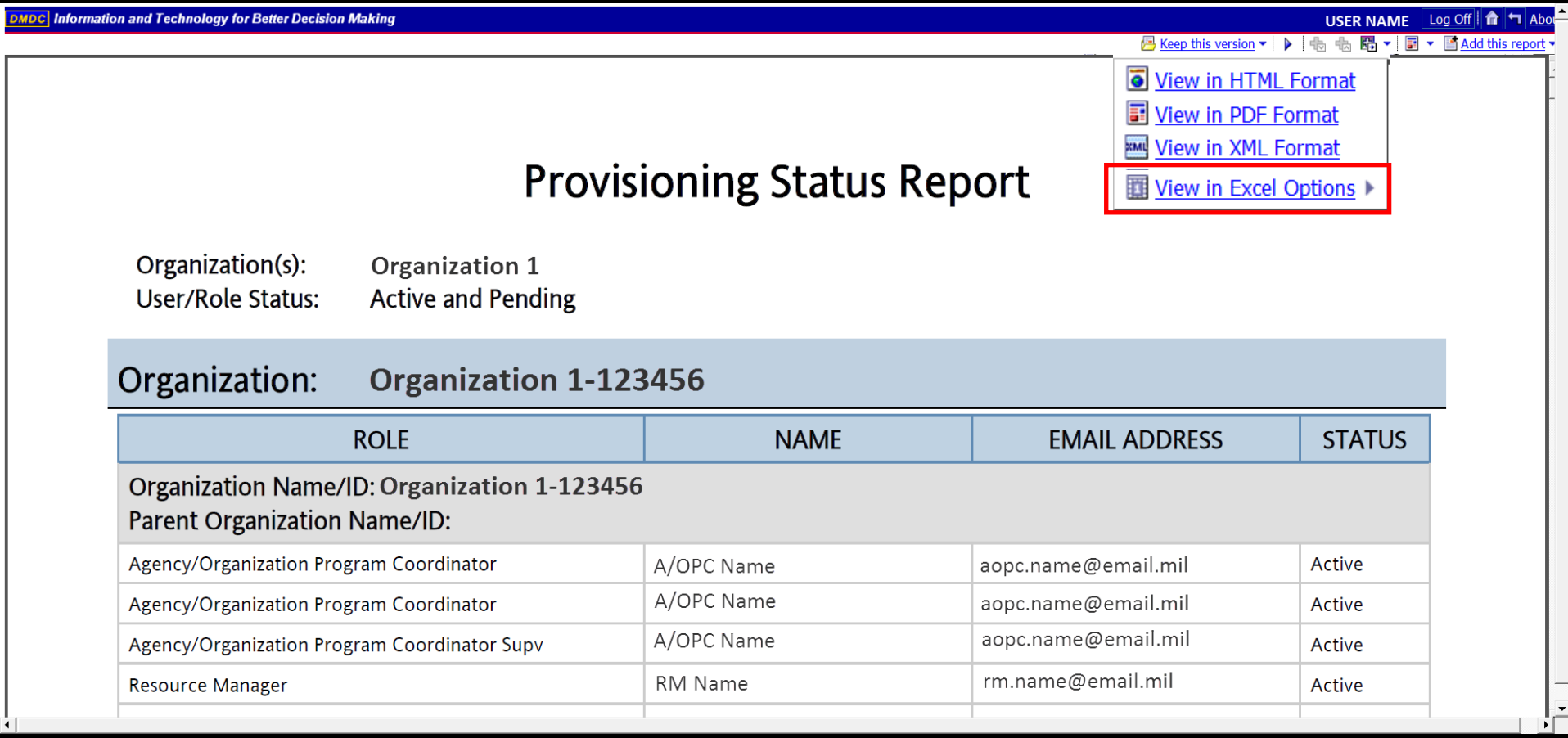
Your report is running. Please wait...

Provisioning Status Report



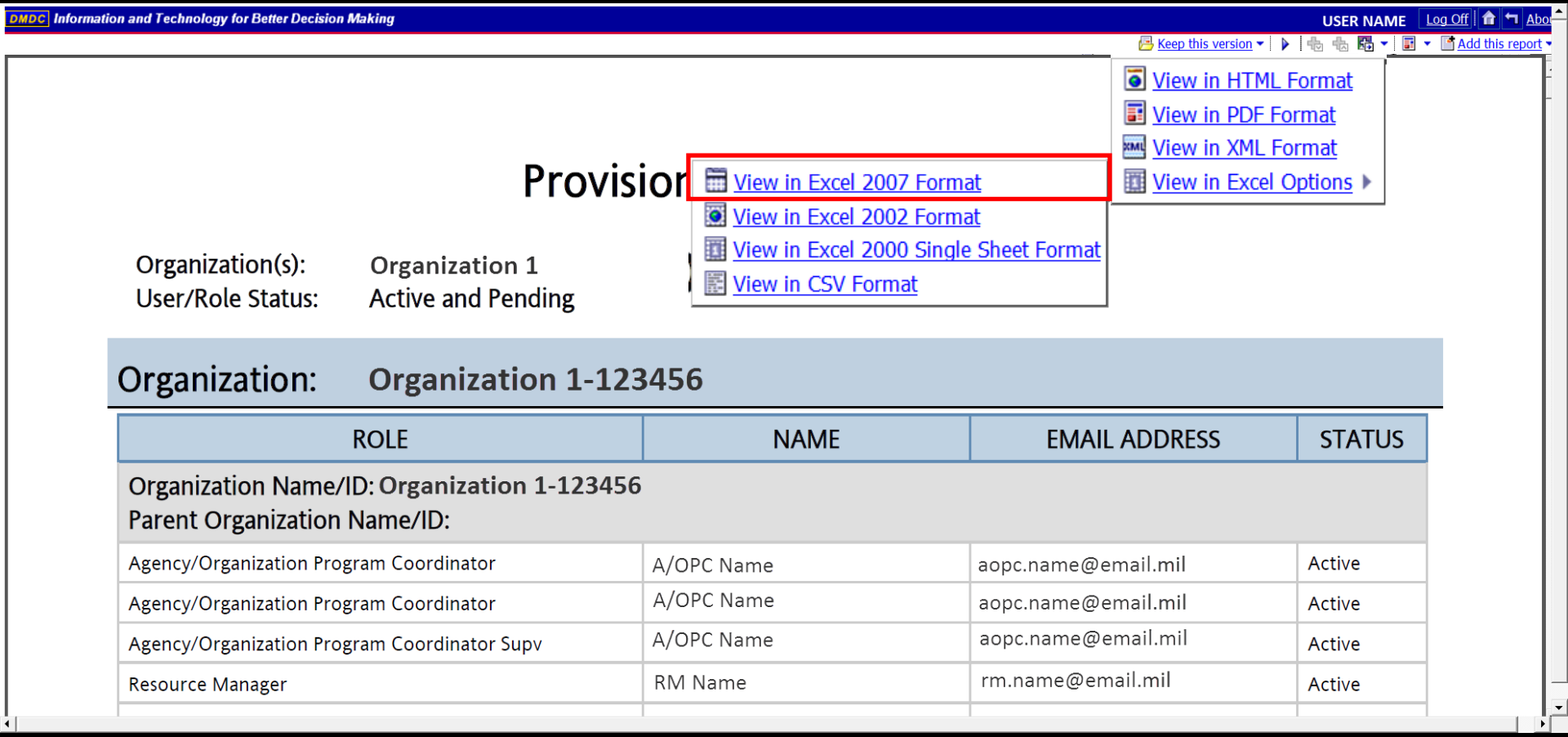
The report has been generated. The report details a list of users provisioned in EMMA, within the selected organization, along with their token redemption status. Click on the Export button.

Provisioning Status Report



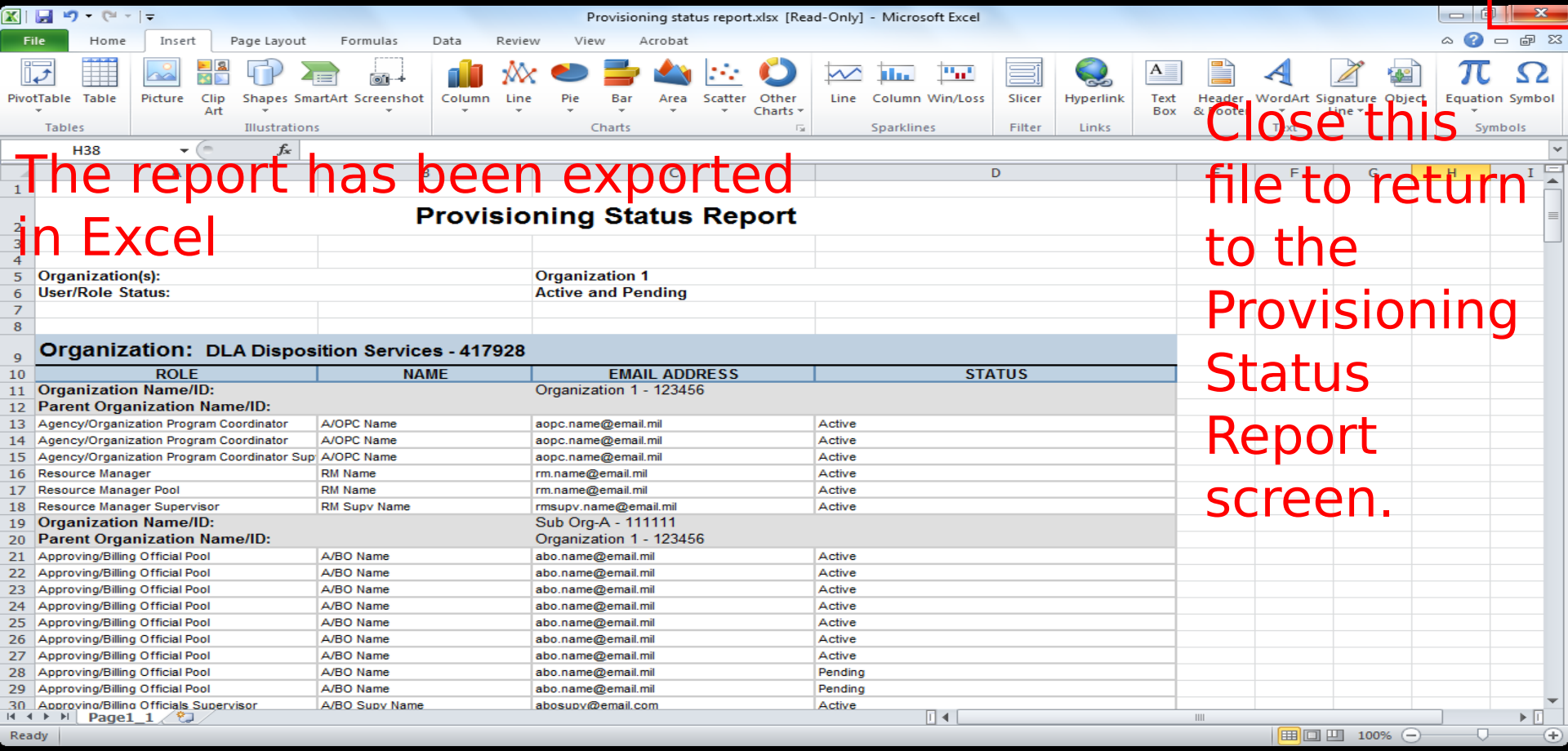
A drop down menu displays available format options for your report. Reports can be viewed in HTML, PDF, XML, and Excel formats. Select “View in Excel Options.”

Provisioning Status Report



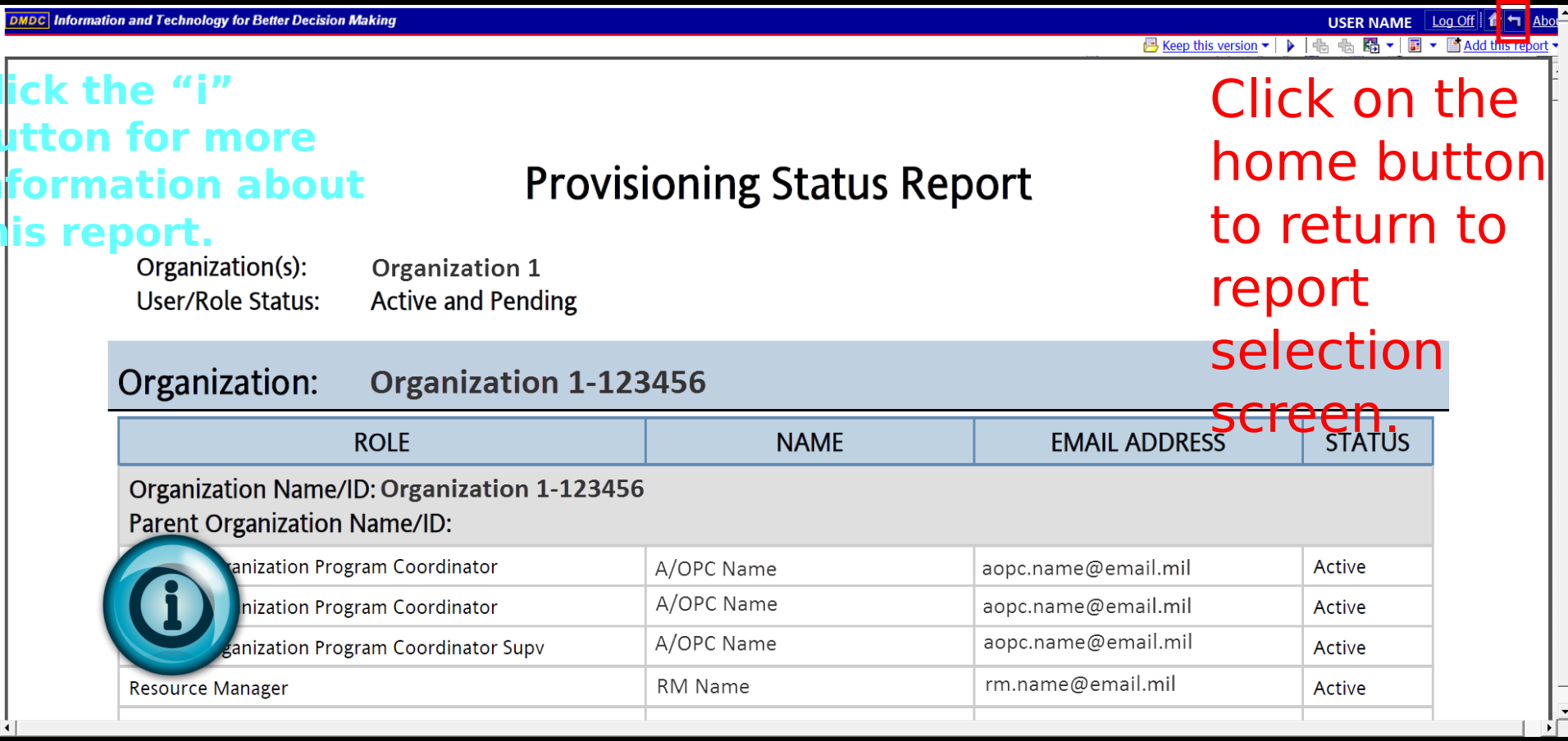
An additional drop down menu will display the Excel formats that are available. For this tutorial we will use Excel 2007. Select “View in Excel 2007 Format.”

Provisioning Status Report


Provisioning status report.xlsx [Read-Only] - Microsoft Excel
The report has been exported in Excel
Close this file to return to the Provisioning Status Report screen.
Provisioning Status Report
Organization(s): Organization 1
User/Role Status: Active and Pending
Organization: DLA Disposition Services - 417928
ROLE | NAME | EMAIL ADDRESS | STATUS
Organization Name/ID: Organization 1 - 123456
Parent Organization Name/ID:
Agency/Organization Program Coordinator | A/OPC Name | aopc.name@email.mil | Active
Agency/Organization Program Coordinator | A/OPC Name | aopc.name@email.mil | Active
Agency/Organization Program Coordinator Sup | A/OPC Name | aopc.name@email.mil | Active
Resource Manager | RM Name | rm.name@email.mil | Active
Resource Manager Pool | RM Name | rm.name@email.mil | Active
Resource Manager Supervisor | RM Supv Name | rmsupv.name@email.mil | Active
Organization Name/ID: Sub Org-A - 111111
Parent Organization Name/ID: Organization 1 - 123456
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Active
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Pending
Approving/Billing Official Pool | A/BO Name | abo.name@email.mil | Pending
Approving/Billing Officials Supervisor | A/BO Supv Name | abosupv@email.com | Active
Page1_1
Ready

The report has been exported in Excel and the option to save it to your computer is available. Click on the “X” button to close out of this report view.

Provisioning Status Report



Click on the home button to return to the Report Selection screen.

Provisioning Status Report

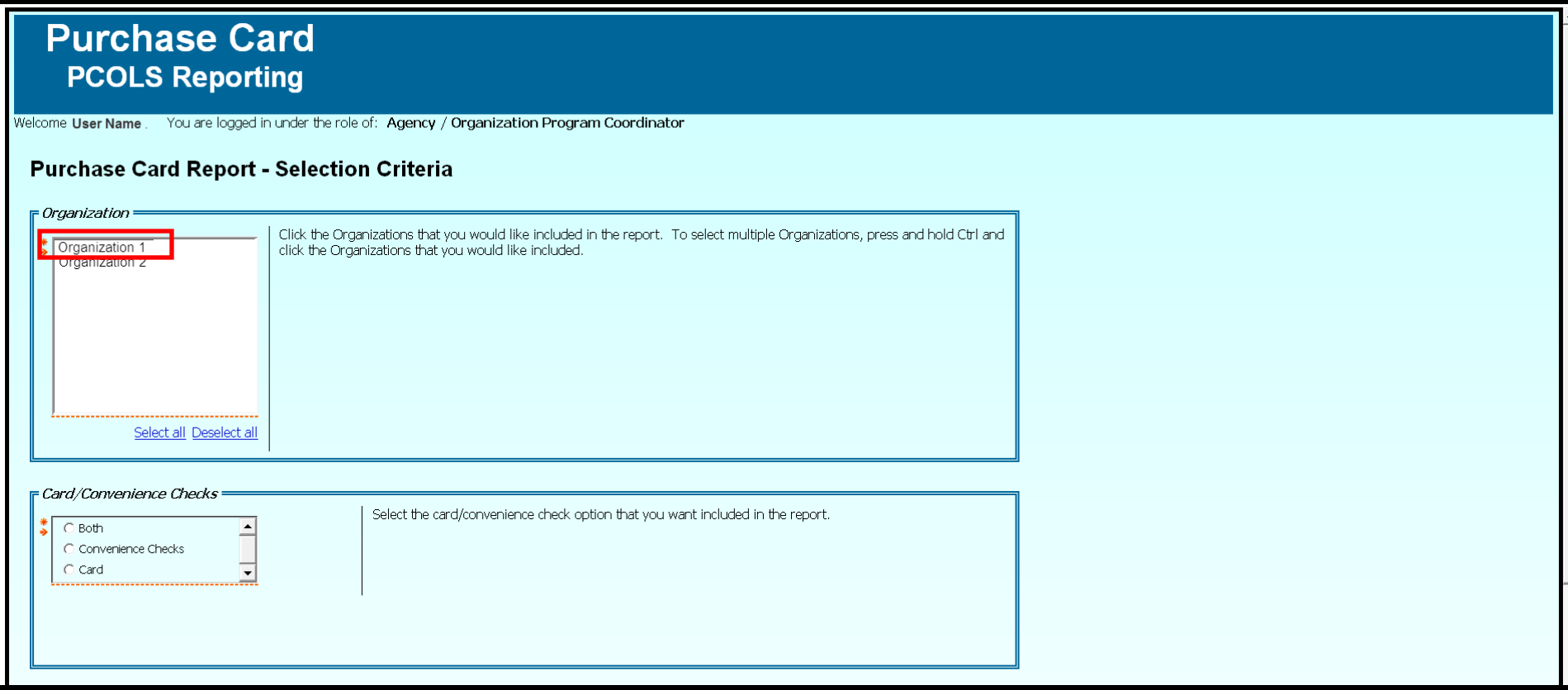
The **benefits** of running this report:

- Ability to quickly view all users provisioned (and tentatively provisioned) in EMMA

- Track tokens that users have not redeemed

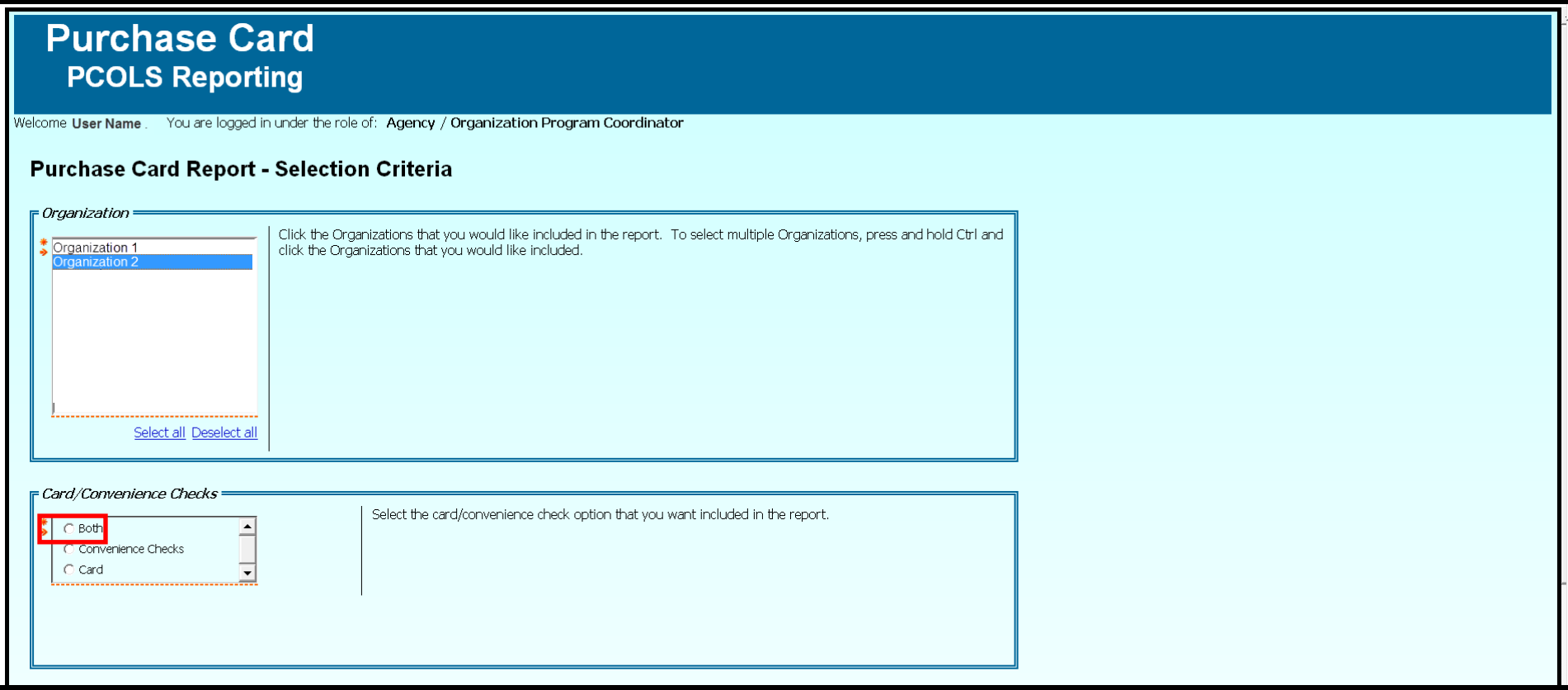
Scenario: The A/OPC for an organization new to PCOLS is tracking the status of users redeeming their EMMA token. “Pending” users have not redeemed their token and this step will need to be completed before the A/OPC can assign them to their accounts in AIM. This report can help the A/OPC locate users that have not completed this process, as a token may need to be resent.

Purchase Card Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Purchase Card Report - Selection Criteria
Organization
Organization 1
Organization 2
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Select all Deselect all
Card/Convenience Checks
Both
Convenience Checks
Card
Select the card/convenience check option that you want included in the report.

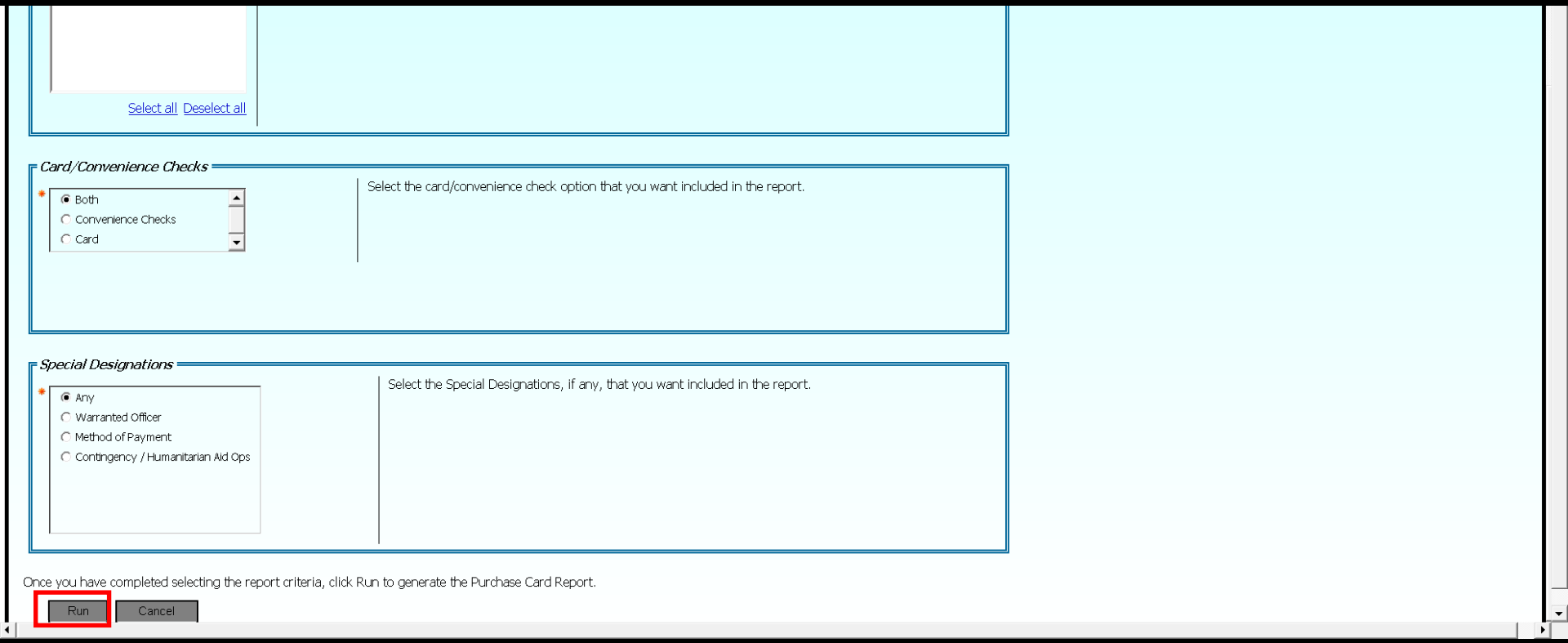
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Purchase Card Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Purchase Card Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Card/Convenience Checks
Both
Convenience Checks
Card
Select the card/convenience check option that you want included in the report.

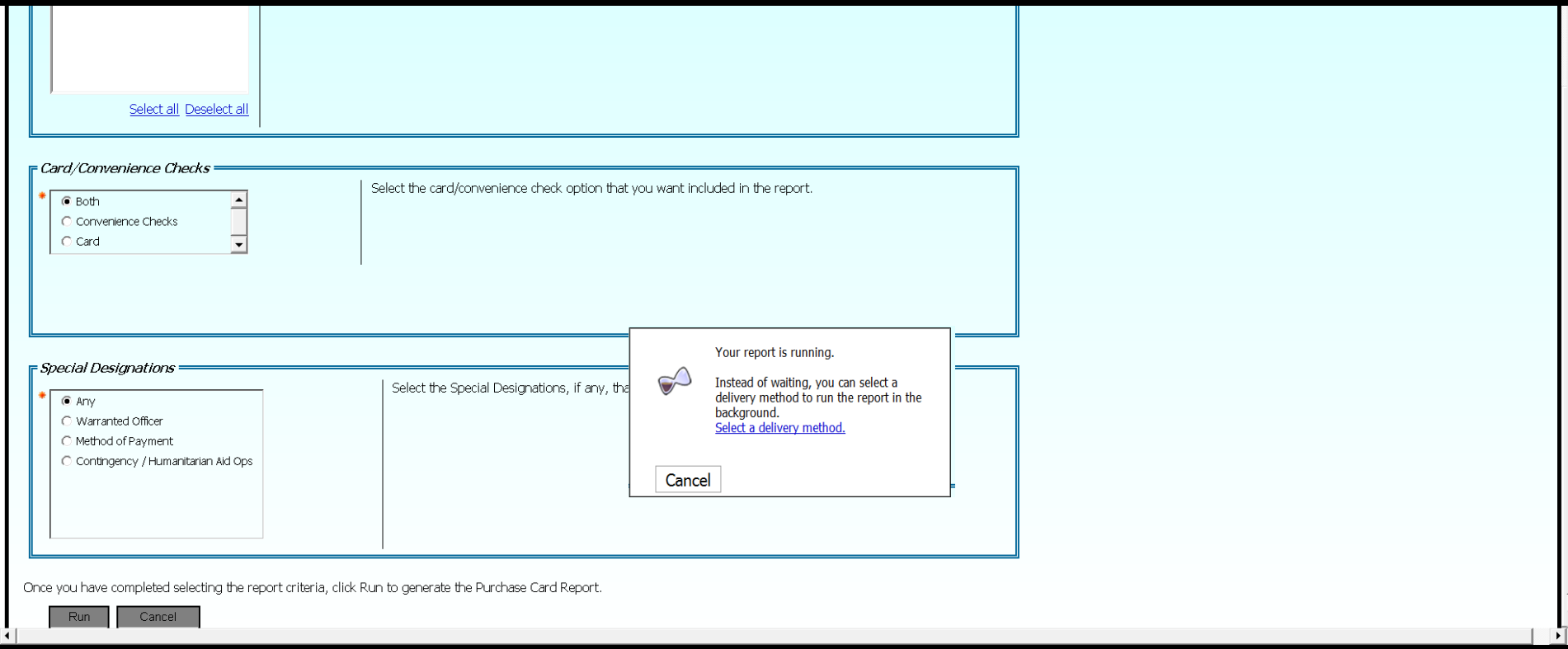
You are required to select the card/convenience check option that you would like included in the report. Select the “Both” radio button.

Purchase Card Report


Select all Deselect all
Card/Convenience Checks
Both
Convenience Checks
Card
Select the card/convenience check option that you want included in the report.
Special Designations
Any
Warranted Officer
Method of Payment
Contingency / Humanitarian Aid Ops
Select the Special Designations, if any, that you want included in the report.
Once you have completed selecting the report criteria, click Run to generate the Purchase Card Report.
Run
Cancel

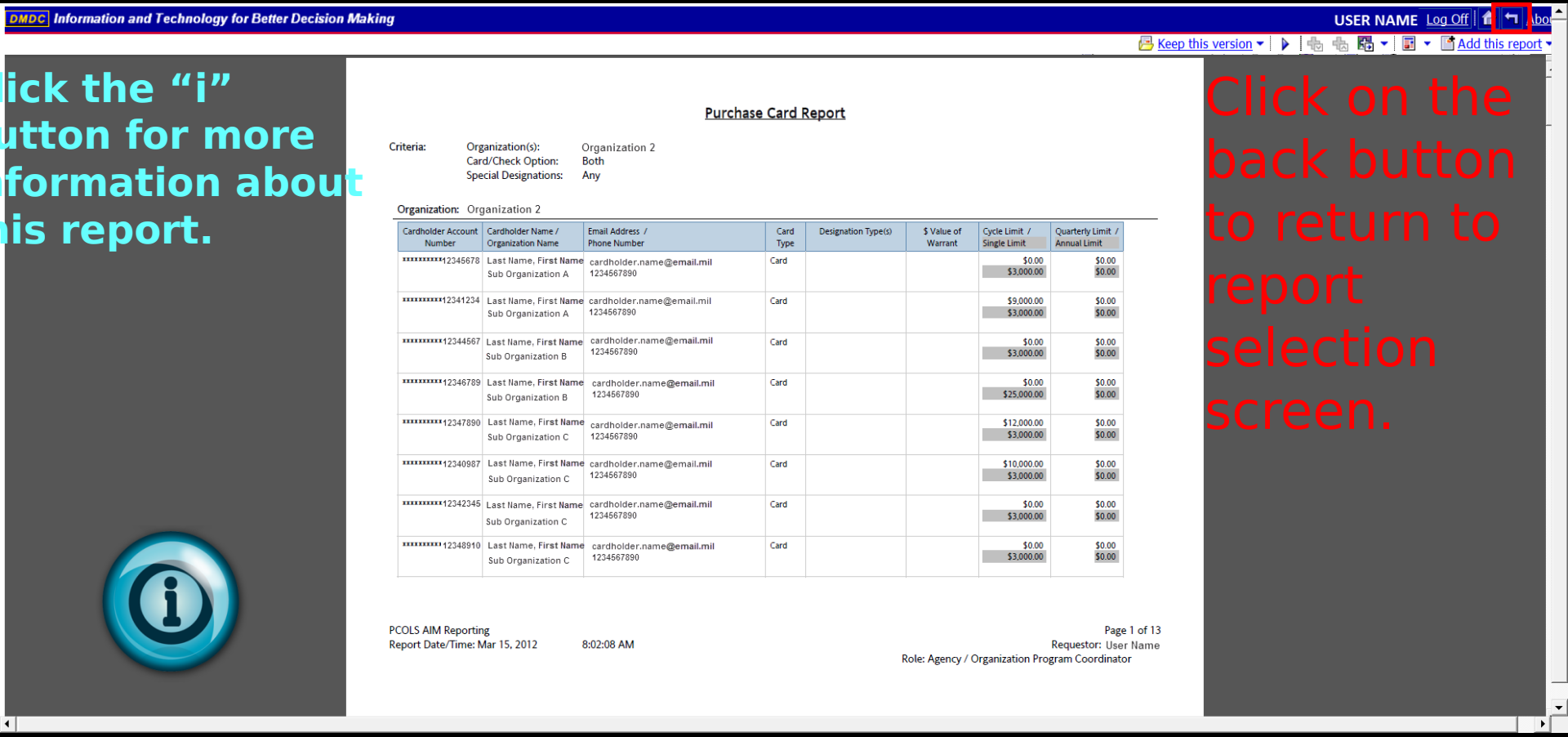
You are required to select Special Designations that you would like included in the report. All required criteria has been selected. Click the “Run” button.

Purchase Card Report


Select all Deselect all
Card/Convenience Checks
Both
Convenience Checks
Card
Select the card/convenience check option that you want included in the report.
Special Designations
Any
Warranted Officer
Method of Payment
Contingency / Humanitarian Aid Ops
Select the Special Designations, if any, tha
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Once you have completed selecting the report criteria, click Run to generate the Purchase Card Report.
Run
Cancel

Your report is running. Please wait...

Purchase Card Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
ick the “i” utton for more formation about is report.
Purchase Card Report
Criteria: Organization(s): Organization 2
Card/Check Option: Both
Special Designations: Any
Organization: Organization 2
Cardholder Account Number | Cardholder Name / Organization Name | Email Address / Phone Number | Card Type | Designation Type(s) | $ Value of Warrant | Cycle Limit / Single Limit | Quarterly Limit / Annual Limit
xxxxxxxxx12345678 | Last Name, First Name Sub Organization A | cardholder.name@email.mil 1234567890 | Card | | | $0.00 $3,000.00 | $0.00 $0.00
xxxxxxxxx12341234 | Last Name, First Name Sub Organization A | cardholder.name@email.mil 1234567890 | Card | | | $9,000.00 $3,000.00 | $0.00 $0.00
xxxxxxxxx12344567 | Last Name, First Name Sub Organization B | cardholder.name@email.mil 1234567890 | Card | | | $0.00 $3,000.00 | $0.00 $0.00
xxxxxxxxx12346789 | Last Name, First Name Sub Organization B | cardholder.name@email.mil 1234567890 | Card | | | $0.00 $25,000.00 | $0.00 $0.00
xxxxxxxxx12347890 | Last Name, First Name Sub Organization C | cardholder.name@email.mil 1234567890 | Card | | | $12,000.00 $3,000.00 | $0.00 $0.00
xxxxxxxxx12340987 | Last Name, First Name Sub Organization C | cardholder.name@email.mil 1234567890 | Card | | | $10,000.00 $3,000.00 | $0.00 $0.00
xxxxxxxxx12342345 | Last Name, First Name Sub Organization C | cardholder.name@email.mil 1234567890 | Card | | | $0.00 $3,000.00 | $0.00 $0.00
xxxxxxxxx12348910 | Last Name, First Name Sub Organization C | cardholder.name@email.mil 1234567890 | Card | | | $0.00 $3,000.00 | $0.00 $0.00
PCOLS AIM Reporting
Report Date/Time: Mar 15, 2012 8:02:08 AM
Page 1 of 13
Requestor: User Name
Role: Agency / Organization Program Coordinator
Click on the back button to report selection screen.

The report has been generated. This report details a list of cardholder accounts and includes data such as account number and purchase limits. Click on the home button to return to the Report Selection screen.

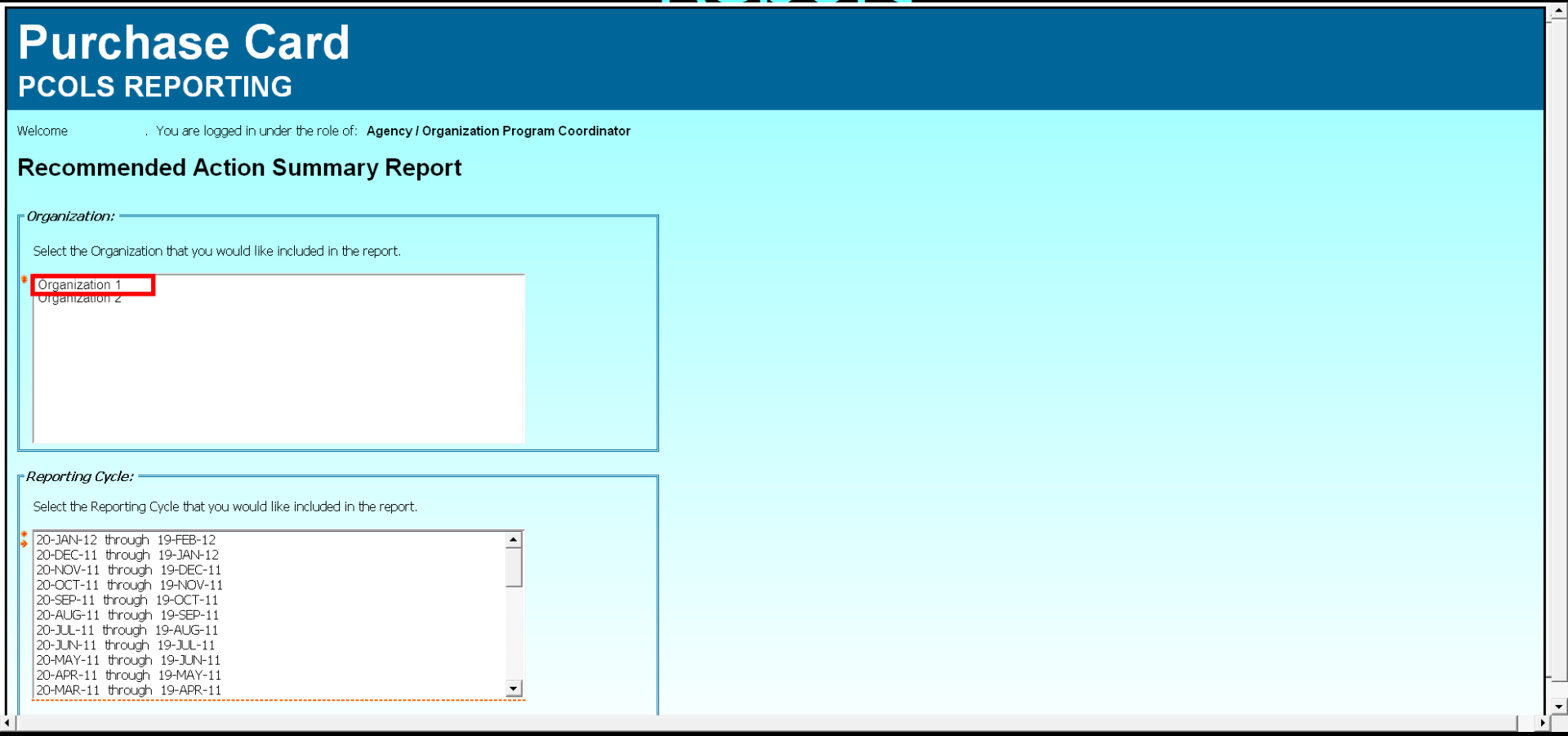
Purchase Card Report

The **benefits** of running this report:

- Ability to quickly view all cardholder data
- Verify purchase limits and special designations

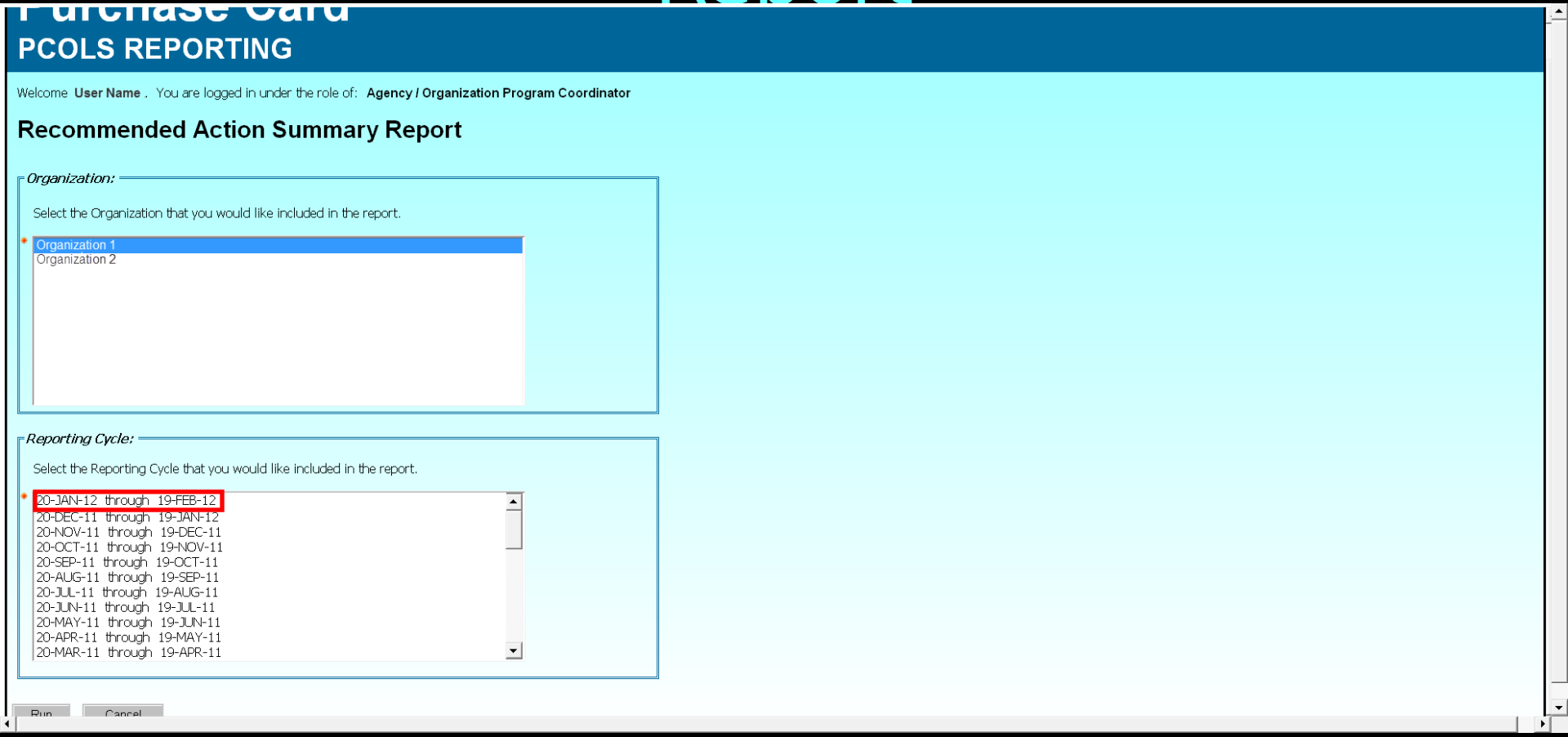
Scenario: The A/OPC runs this report at the end of month to have a list of all active cardholder accounts. This allows the A/OPC to quickly locate account numbers for cardholders and confirm the correct purchase limits are assigned. This report is also utilized by higher level roles to monitor purchase limits that exceed the micro-purchase limit.

Recommended Action Summary Report


Purchase Card
PCOLS REPORTING
Welcome . You are logged in under the role of: Agency / Organization Program Coordinator
Recommended Action Summary Report
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11

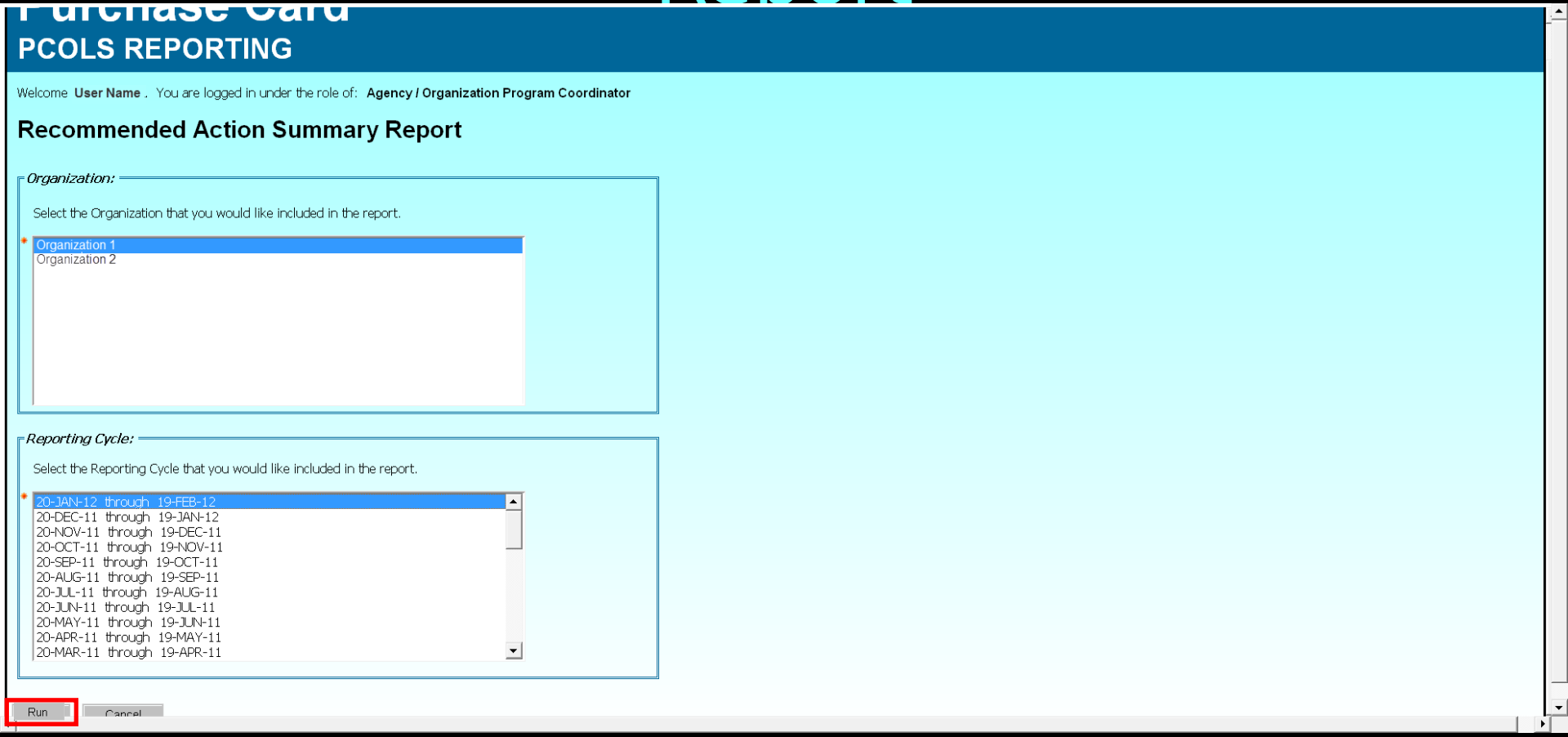
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select "Organization 1."

Recommended Action Summary Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Recommended Action Summary Report
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Run
Cancel

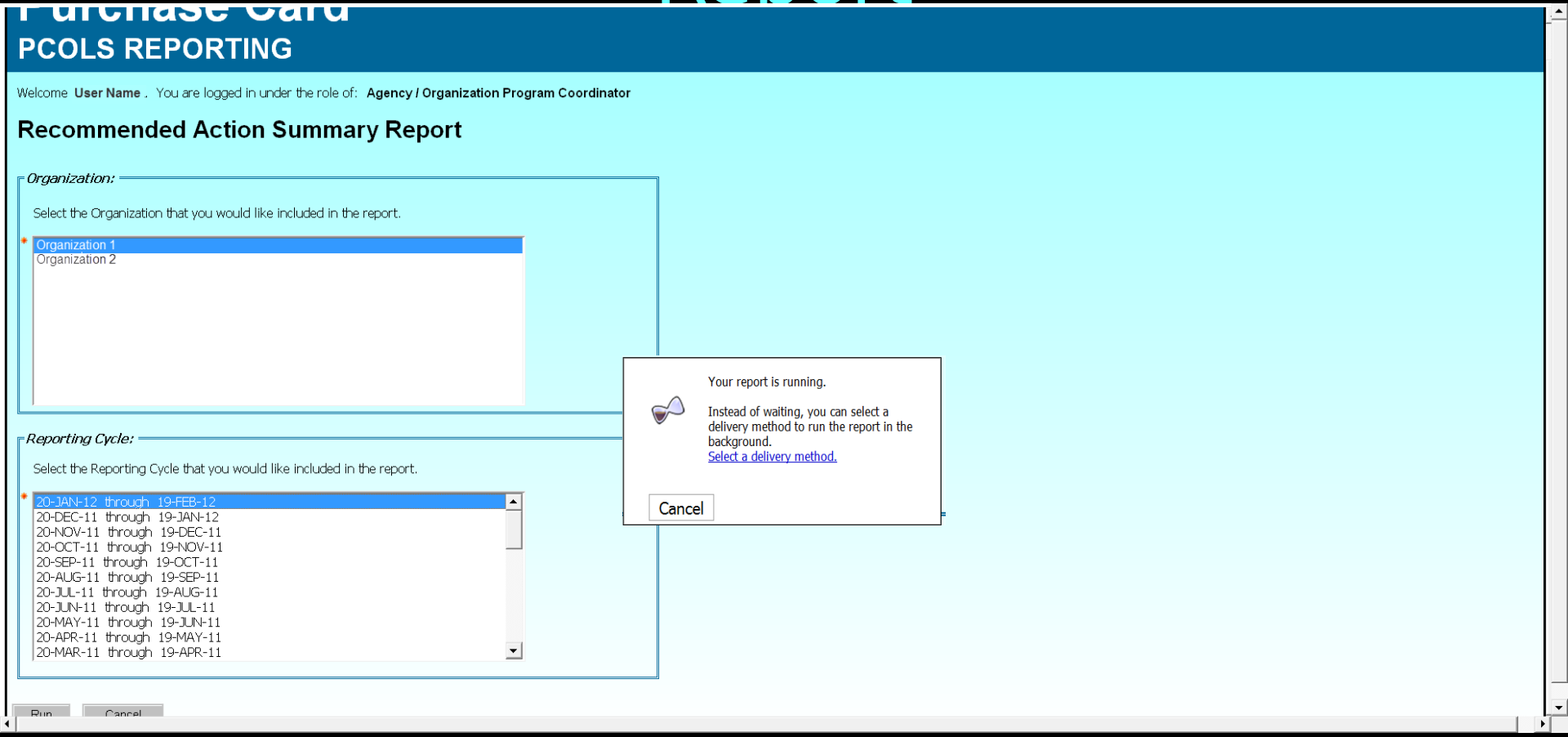
You are required to select the Reporting Cycle that will be included on the report. Select the “20-JAN-12 through 19-FEB-12” Reporting Cycle.

Recommended Action Summary Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Recommended Action Summary Report
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Run
Cancel

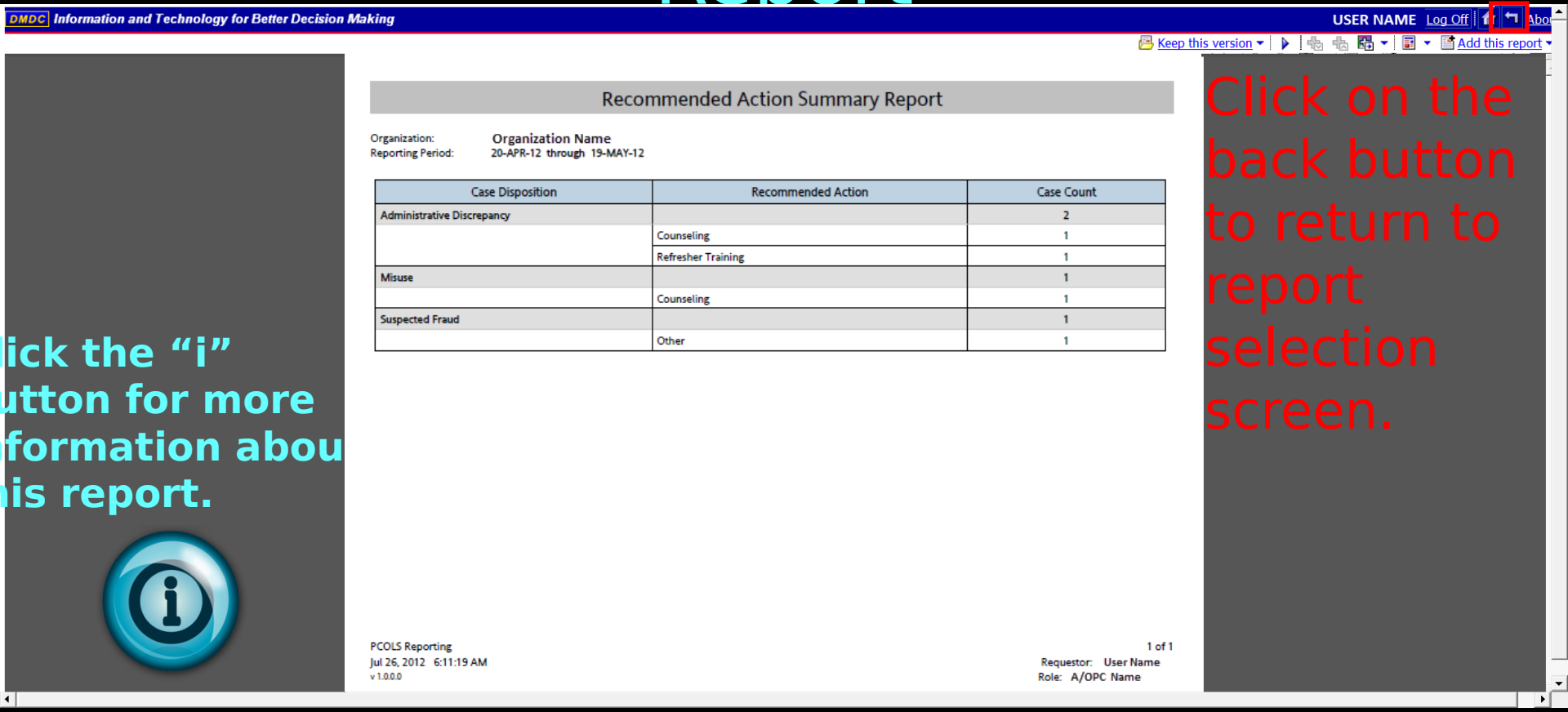
All required criteria has been selected. Click the “Run” button.

Recommended Action Summary Report


PCOLS REPORTING
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Recommended Action Summary Report
Organization:
Select the Organization that you would like included in the report.
Organization 1
Organization 2
Reporting Cycle:
Select the Reporting Cycle that you would like included in the report.
20-JAN-12 through 19-FEB-12
20-DEC-11 through 19-JAN-12
20-NOV-11 through 19-DEC-11
20-OCT-11 through 19-NOV-11
20-SEP-11 through 19-OCT-11
20-AUG-11 through 19-SEP-11
20-JUL-11 through 19-AUG-11
20-JUN-11 through 19-JUL-11
20-MAY-11 through 19-JUN-11
20-APR-11 through 19-MAY-11
20-MAR-11 through 19-APR-11
Run
Cancel
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel

Your report is running. Please wait...

Recommended Action Summary Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
Recommended Action Summary Report
Organization: Organization Name
Reporting Period: 20-APR-12 through 19-MAY-12
Case Disposition | Recommended Action | Case Count
Administrative Discrepancy | | 2
Counseling | 1
Refresher Training | 1
Misuse | | 1
Counseling | 1
Suspected Fraud | | 1
Other | 1
PCOLS Reporting
Jul 26, 2012 6:11:19 AM
v 1.0.0.0
1 of 1
Requestor: User Name
Role: A/OPC Name
ick the "i"
utton for more
formation abou
is report.
Click on the back button to return to report selection screen.

The report has been generated. This report allow users to view a summary of DM flagged transaction case dispositions other than Valid and Contract Payment, and their associated planned actions.

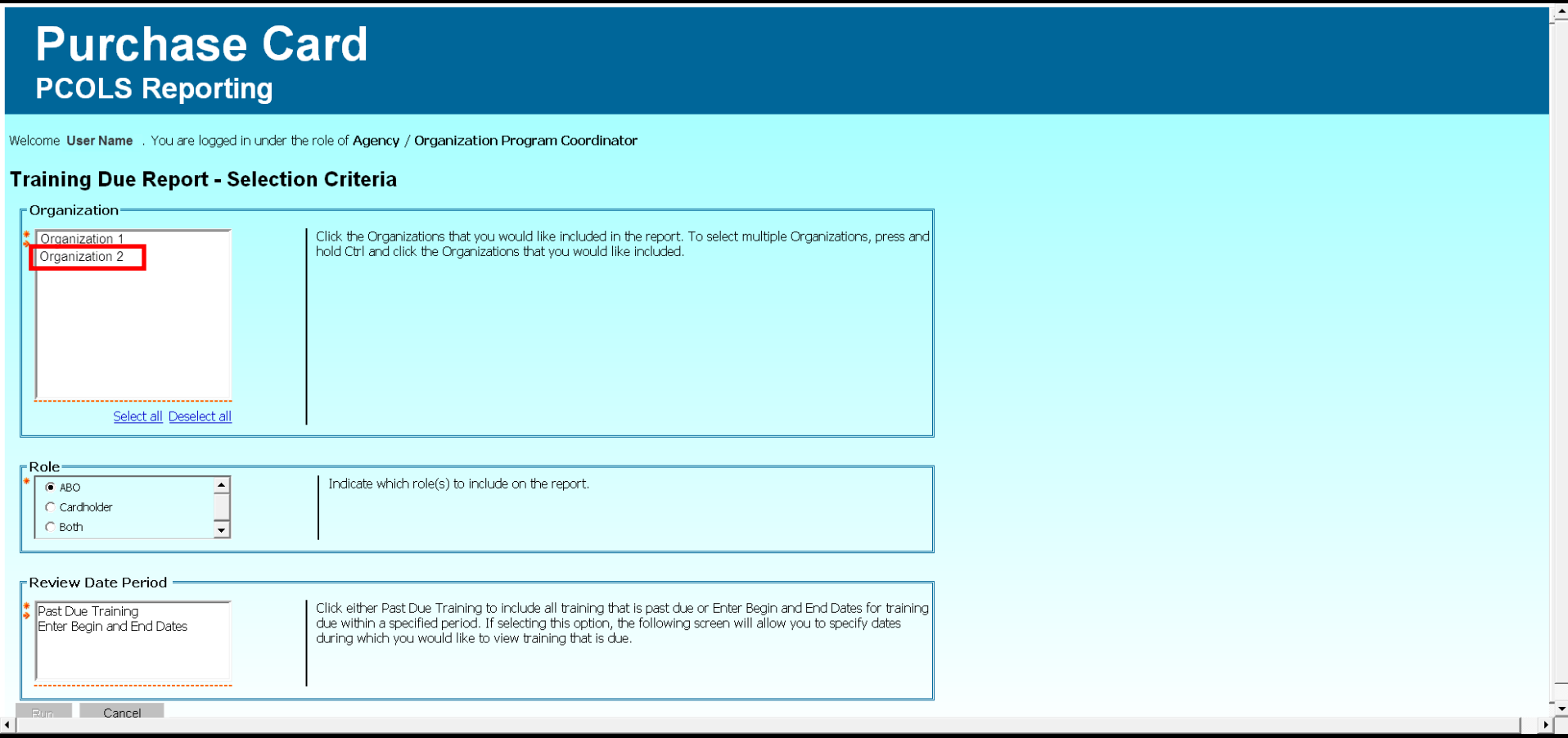
Recommended Action Summary Report

The **benefits** of running this report:

- Ability to quickly view all planned actions for transaction that were closed as other than Valid and Contract Payment
- Lists details each case, including the number closed with the same disposition

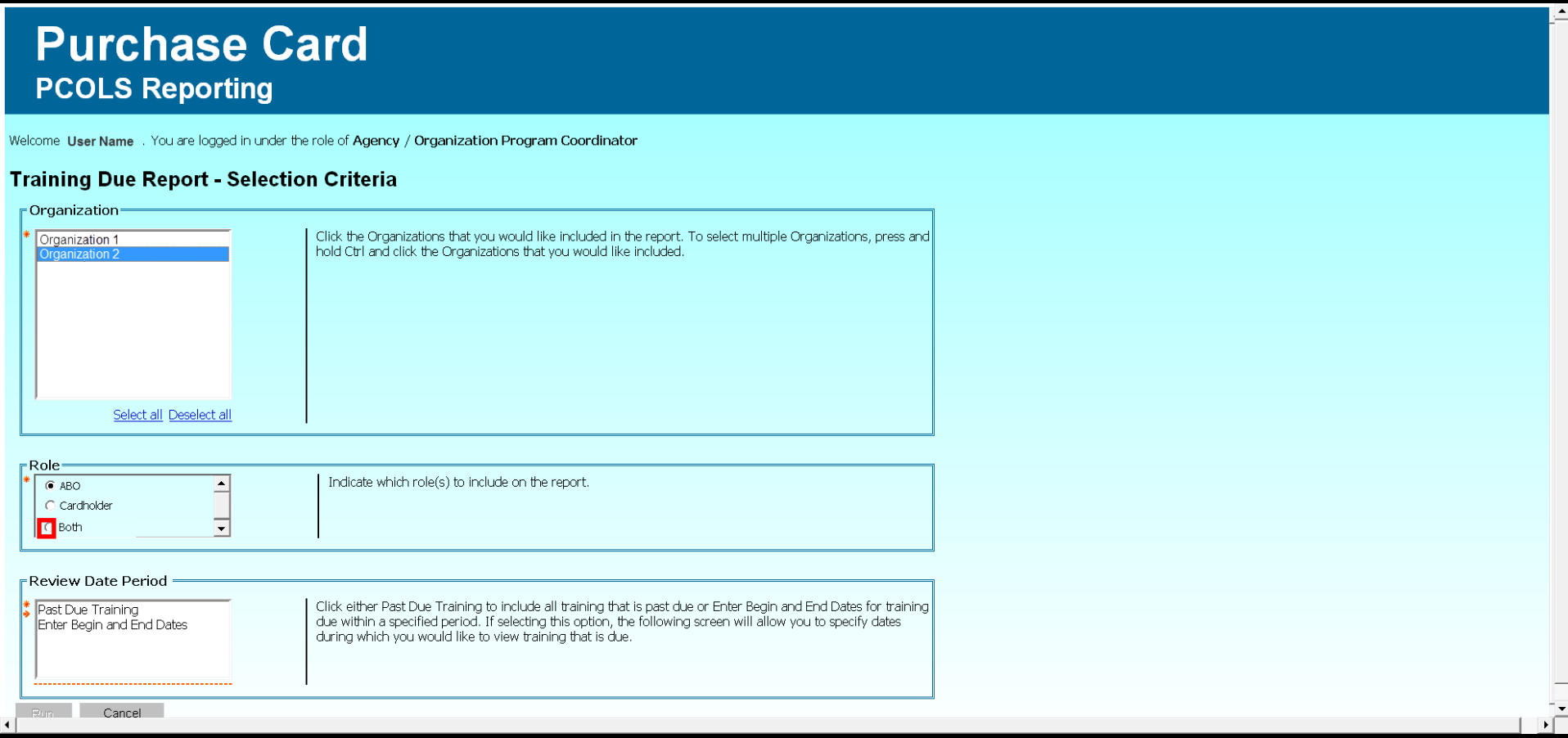
Scenario: The A/OPC frequently completes Independent Reviews on cases dispositioned by their A/BOs in Data Mining and may already be aware of the data displayed in this report. Higher level roles such as the A/OPC Supervisor can use this report to quickly review details from cases at the end of a given billing cycle. This increases internal control the organization's GPC program.

Training Due Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Training Due Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Role
ABO
Cardholder
Both
Indicate which role(s) to include on the report.
Review Date Period
Past Due Training
Enter Begin and End Dates
Click either Past Due Training to include all training that is past due or Enter Begin and End Dates for training due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view training that is due.
Run
Cancel

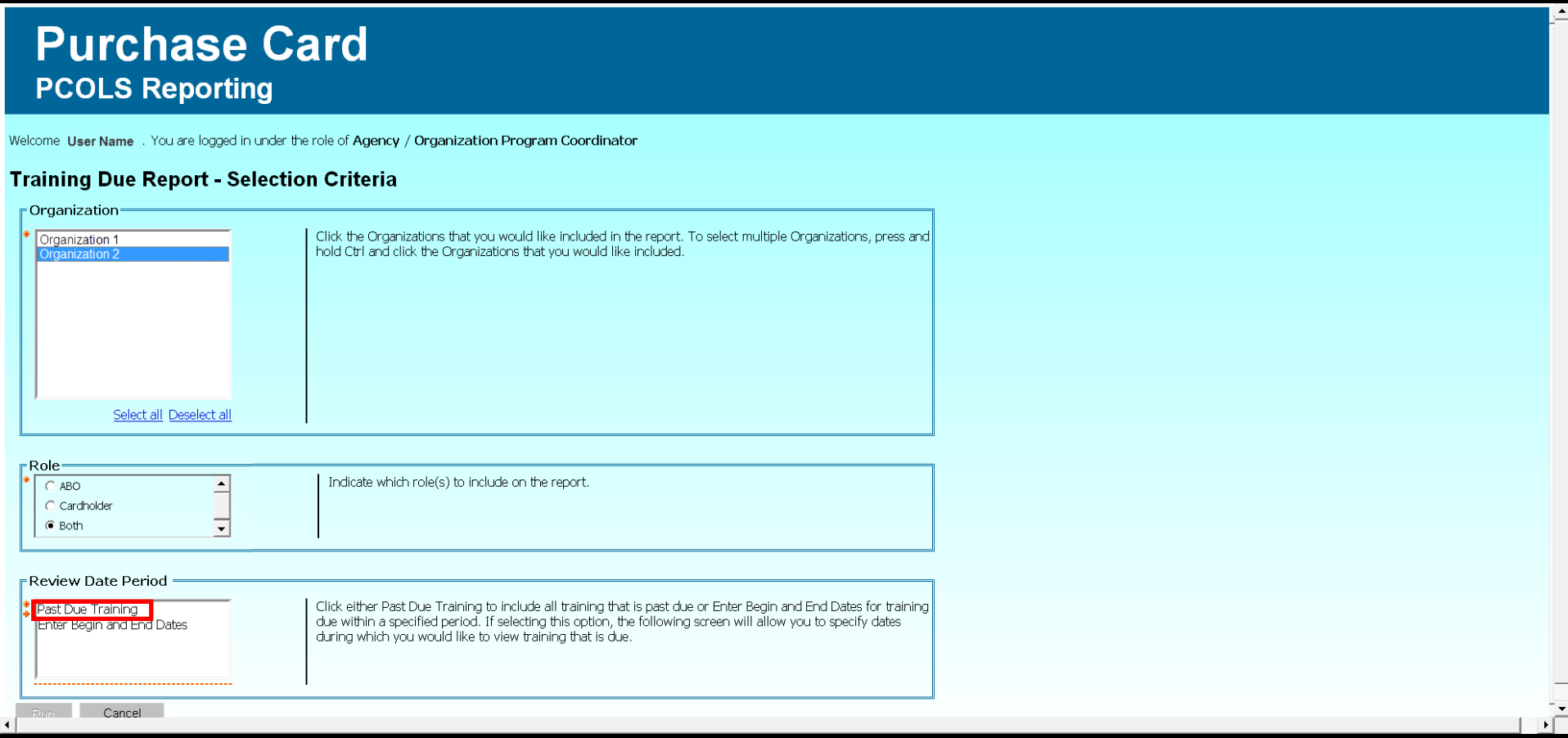
You are at the Selection Criteria screen. You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select "Organization 2."

Training Due Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Training Due Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Role
ABO
Cardholder
Both
Indicate which role(s) to include on the report.
Review Date Period
Past Due Training
Enter Begin and End Dates
Click either Past Due Training to include all training that is past due or Enter Begin and End Dates for training due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view training that is due.
Run
Cancel

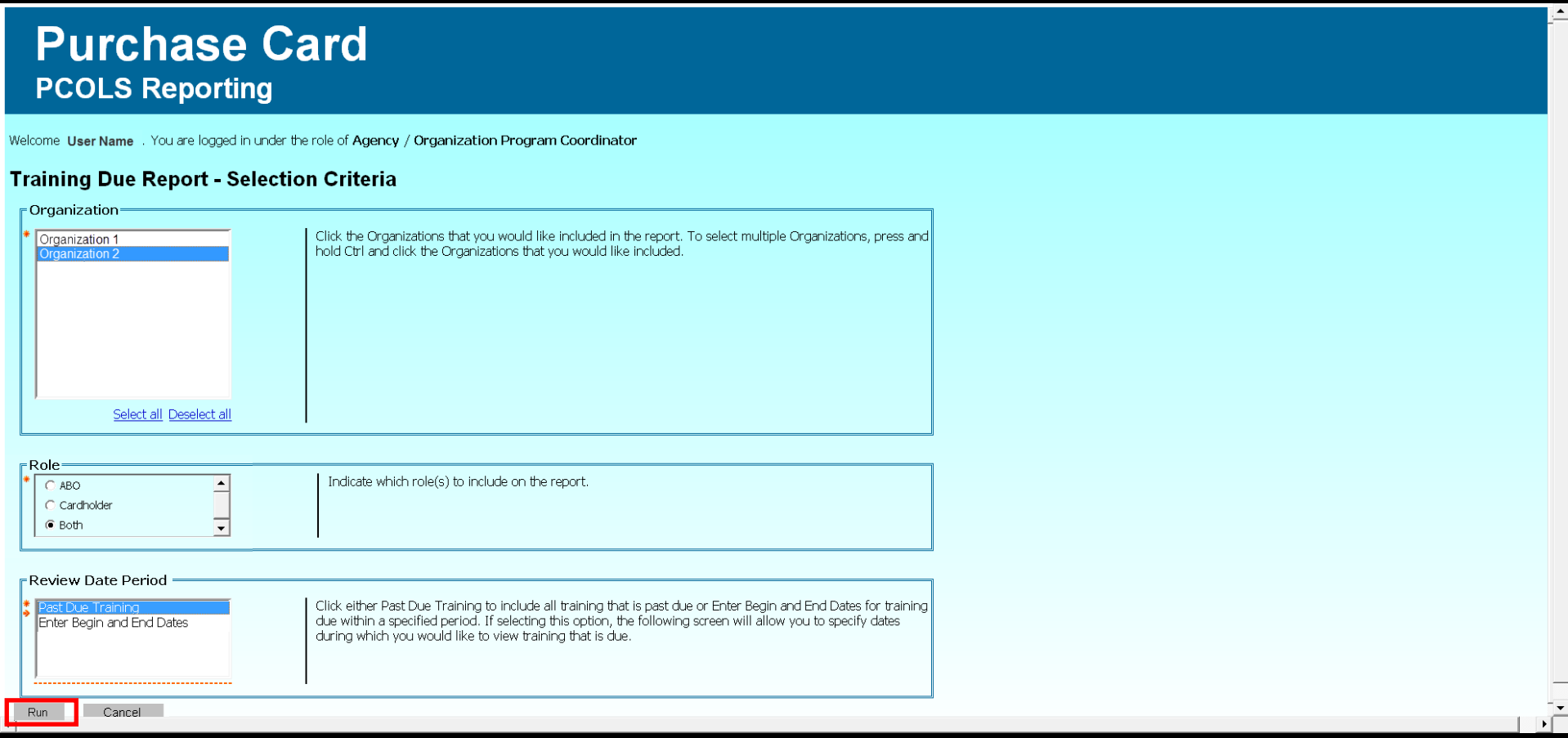
You are required to select which role you would like to include in the report, A/BO, Cardholder, or Both. Select the “Both” radio button.

Training Due Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Training Due Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Role
ABO
Cardholder
Both
Indicate which role(s) to include on the report.
Review Date Period
Past Due Training
Enter Begin and End Dates
Click either Past Due Training to include all training that is past due or Enter Begin and End Dates for training due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view training that is due.
Run
Cancel

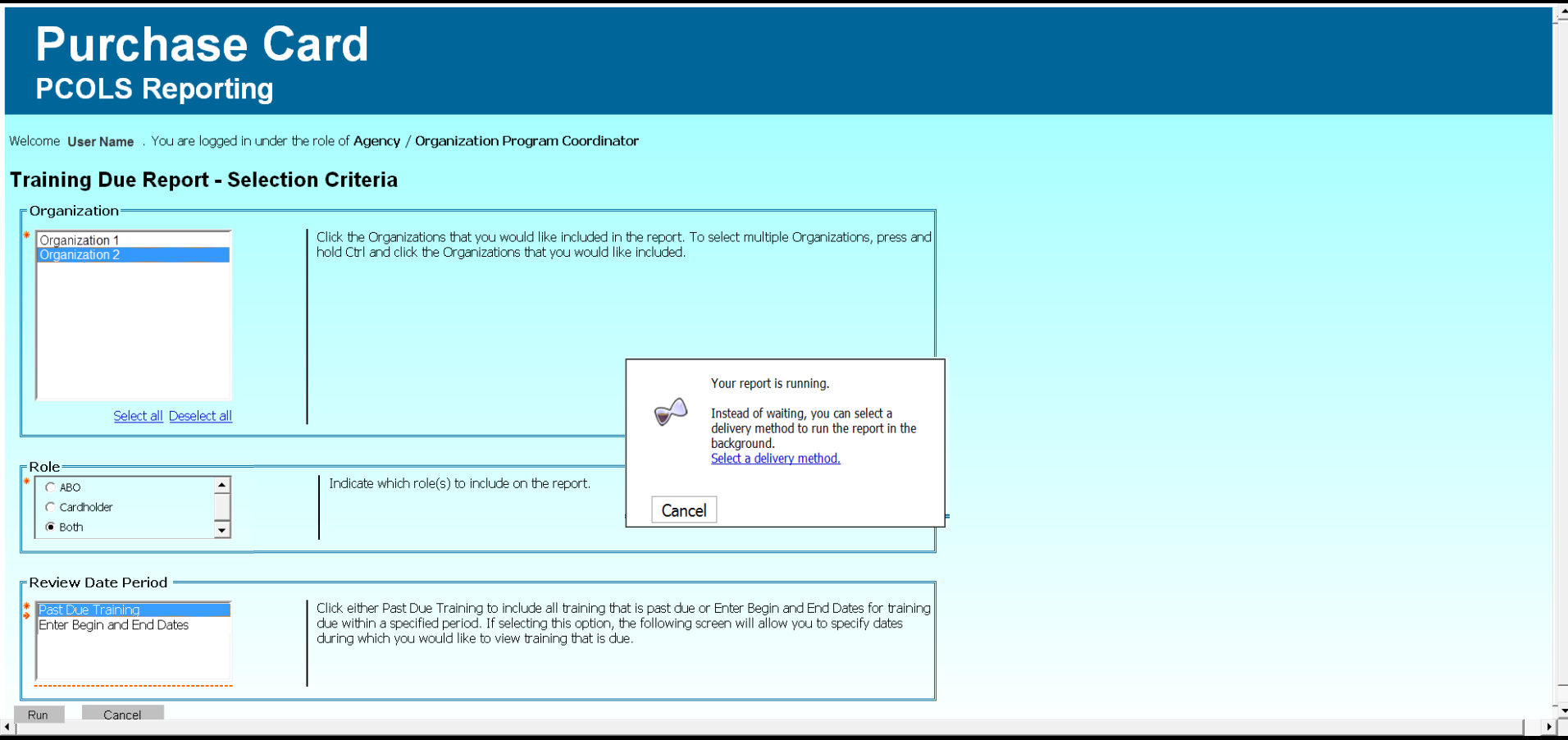
You are required to select the Review Date Period that includes Past Due Training or Enter Begin and End Dates. Select “Past Due Training.”

Training Due Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Training Due Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Role
ABO
Cardholder
Both
Indicate which role(s) to include on the report.
Review Date Period
Past Due Training
Enter Begin and End Dates
Click either Past Due Training to include all training that is past due or Enter Begin and End Dates for training due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view training that is due.
Run
Cancel

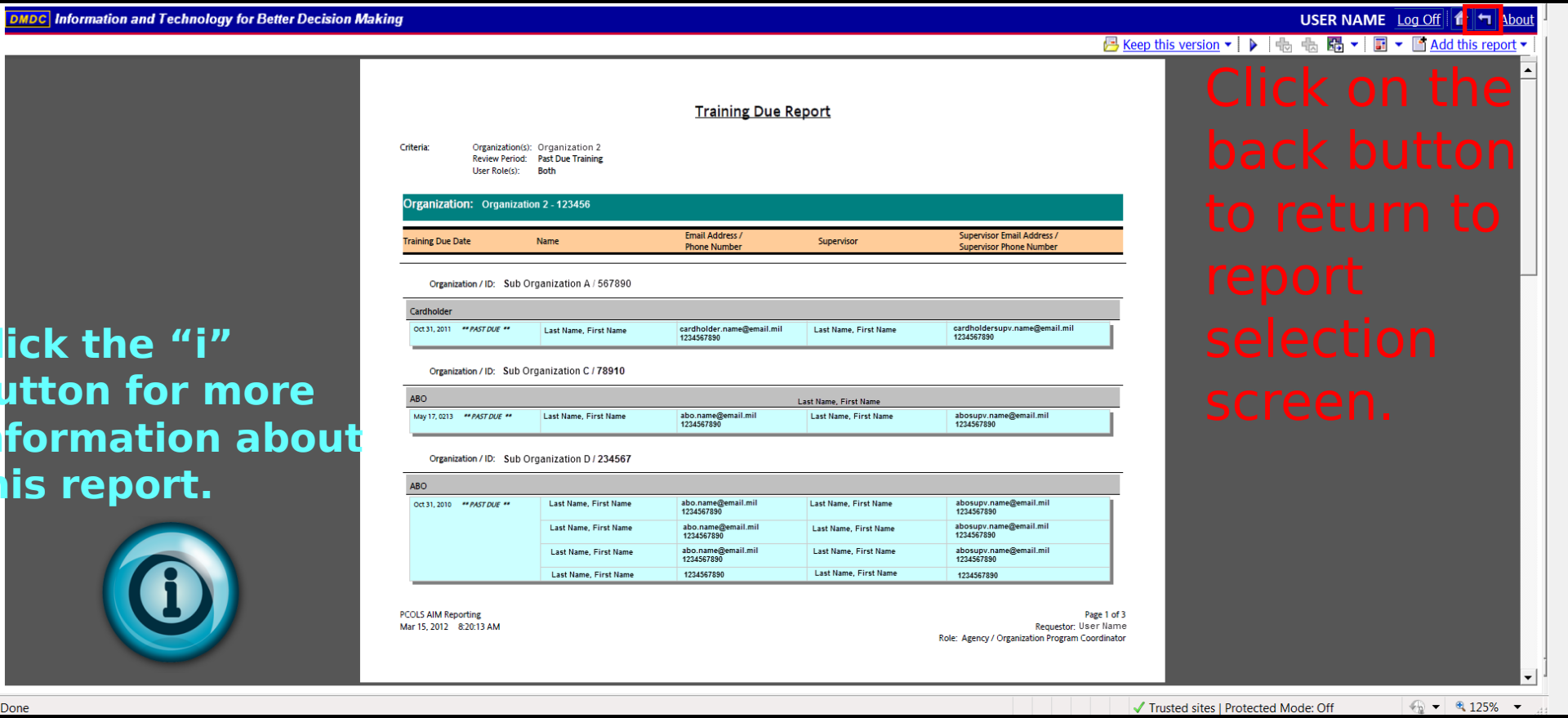
All required criteria has been selected. Click the “Run” button.

Training Due Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of Agency / Organization Program Coordinator
Training Due Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Role
ABO
Cardholder
Both
Indicate which role(s) to include on the report.
Review Date Period
Past Due Training
Enter Begin and End Dates
Click either Past Due Training to include all training that is past due or Enter Begin and End Dates for training due within a specified period. If selecting this option, the following screen will allow you to specify dates during which you would like to view training that is due.
Run
Cancel

Your report is running. Please wait...

Training Due Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off About
Keep this version
Add this report
ick the "i" utton for more formation about is report.
Training Due Report
Criteria: Organization(s): Organization 2
Review Period: Past Due Training
User Role(s): Both
Organization: Organization 2 - 123456
Training Due Date
Name
Email Address / Phone Number
Supervisor
Supervisor Email Address / Supervisor Phone Number
Organization / ID: Sub Organization A / 567890
Cardholder
Oct 31, 2011 ** PAST DUE **
Last Name, First Name
cardholder.name@email.mil 1234567890
Last Name, First Name
cardholdersupv.name@email.mil 1234567890
Organization / ID: Sub Organization C / 78910
ABO
May 17, 0213 ** PAST DUE **
Last Name, First Name
abo.name@email.mil 1234567890
Last Name, First Name
abosupv.name@email.mil 1234567890
Organization / ID: Sub Organization D / 234567
ABO
Oct 31, 2010 ** PAST DUE **
Last Name, First Name
abo.name@email.mil 1234567890
Last Name, First Name
abosupv.name@email.mil 1234567890
1234567890
PCOLS AIM Reporting
Mar 15, 2012 8:20:13 AM
Page 1 of 3
Requestor: User Name
Role: Agency / Organization Program Coordinator
Click on the back button to return to report selection screen.
Done
Trusted sites | Protected Mode: Off
125%

The report has been generated. The report details a list of dates that training is due for A/BOs, Cardholder, or both. The date reported is listed as 2 years from the current date of the training listed in AIM.

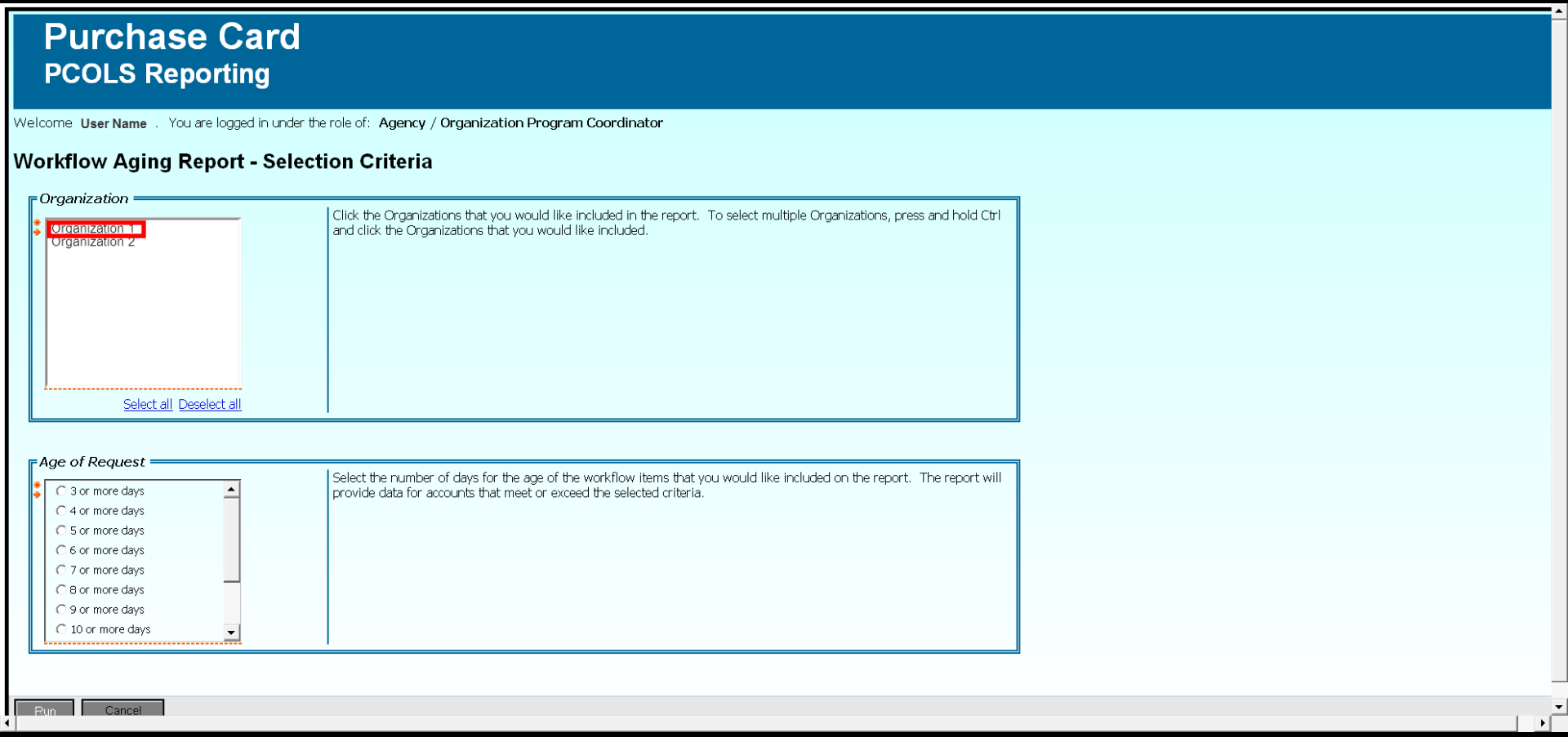
Training Due Report

The **benefits** of running this report:

- Ability to quickly view all training due for cardholders and A/BOs
- Find any training that may be past due

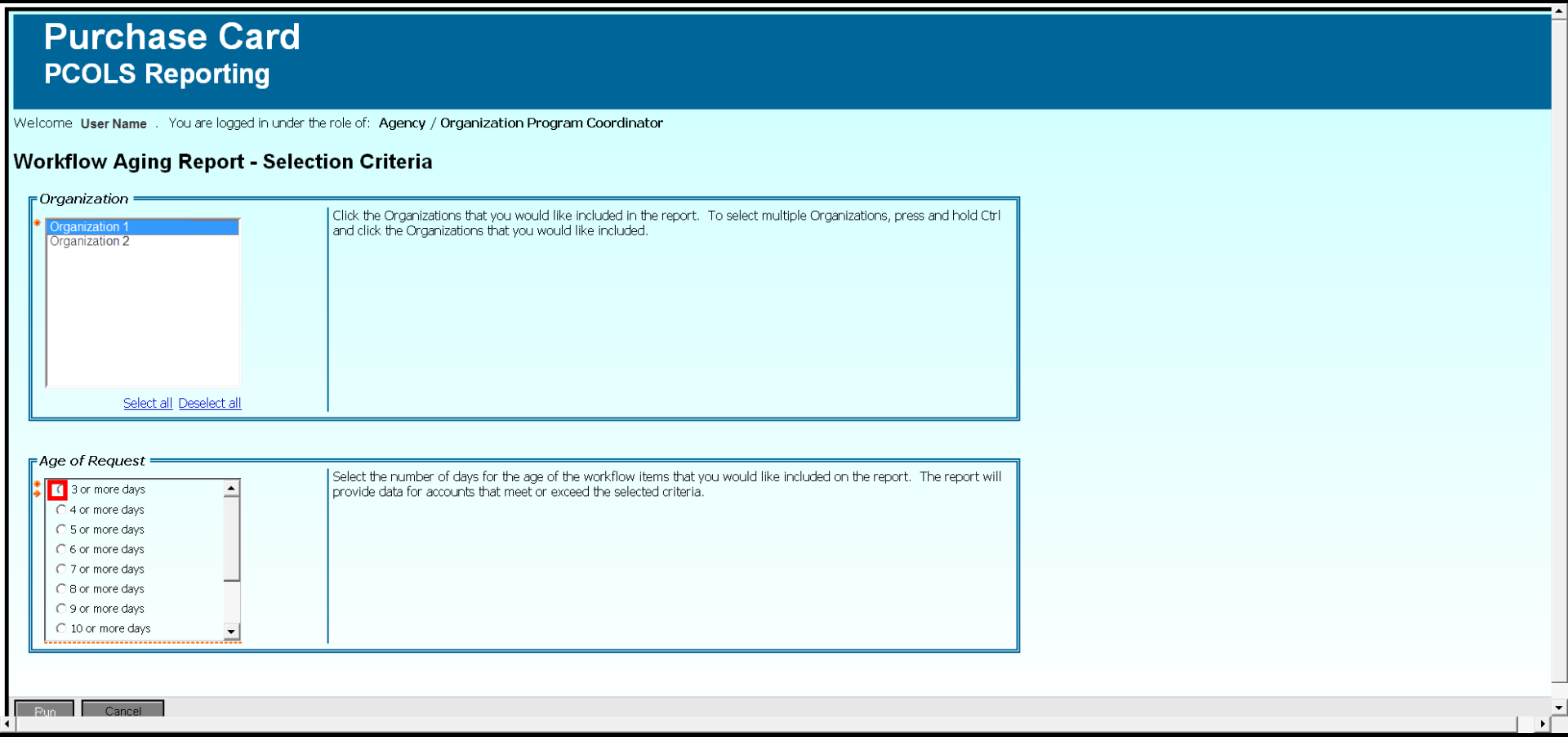
Scenario: All A/BOs and Cardholder's will receive an automated PCOLS notification email 60 days and 30 days before training is due to expire. An email is also sent on the actual date when the refresher training is past due. The A/OPC runs this report at the beginning of each month to track upcoming training that is to expire for their account holders.

Workflow Aging Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Workflow Aging Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Age of Request
3 or more days
4 or more days
5 or more days
6 or more days
7 or more days
8 or more days
9 or more days
10 or more days
Select the number of days for the age of the workflow items that you would like included on the report. The report will provide data for accounts that meet or exceed the selected criteria.
Run
Cancel

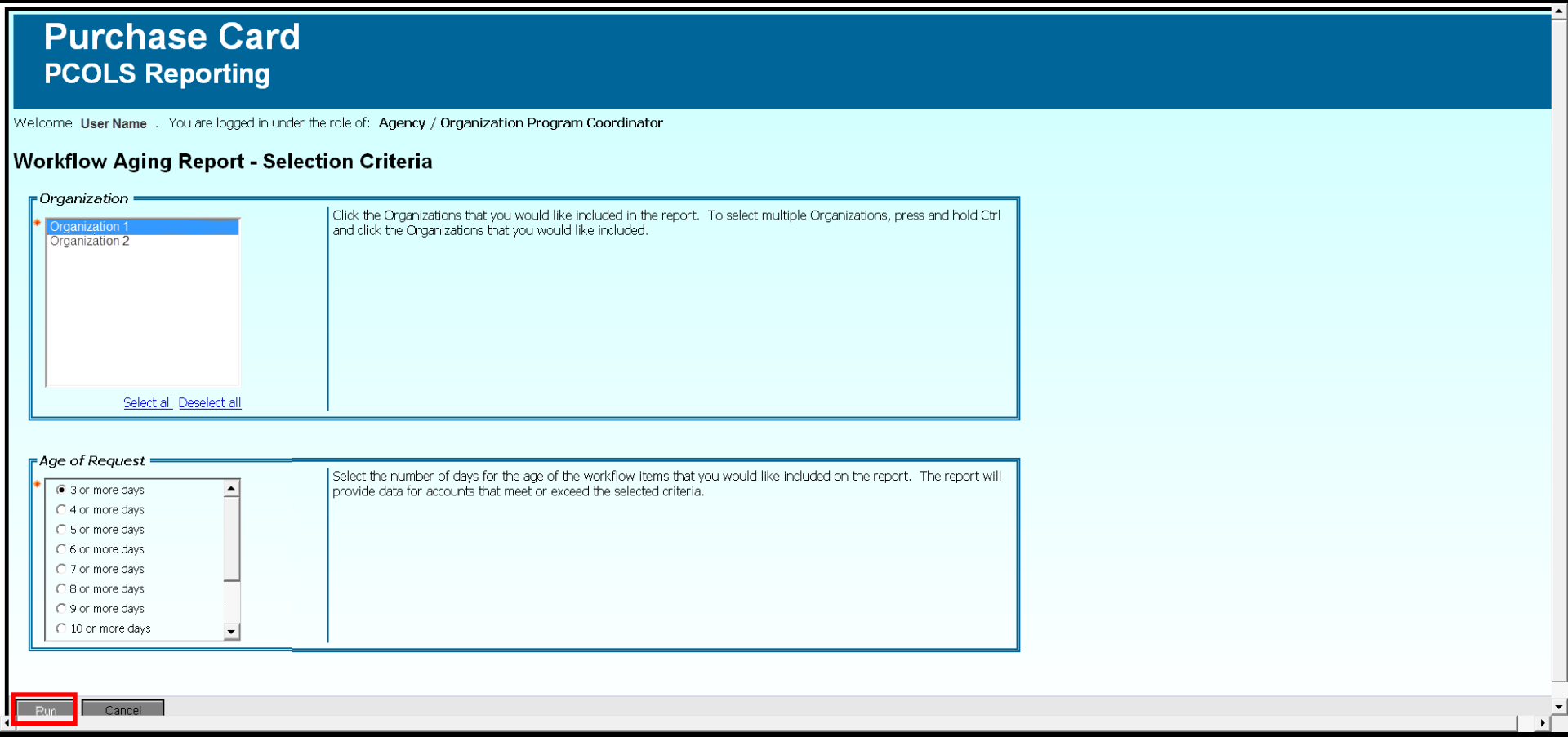
You are at the Selection Criteria screen . You will need to select the organization that you would like included in the report. You have the option to select multiple organizations. Select “Organization 1.”

Workflow Aging Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Workflow Aging Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Age of Request
3 or more days
4 or more days
5 or more days
6 or more days
7 or more days
8 or more days
9 or more days
10 or more days
Select the number of days for the age of the workflow items that you would like included on the report. The report will provide data for accounts that meet or exceed the selected criteria.
Run
Cancel

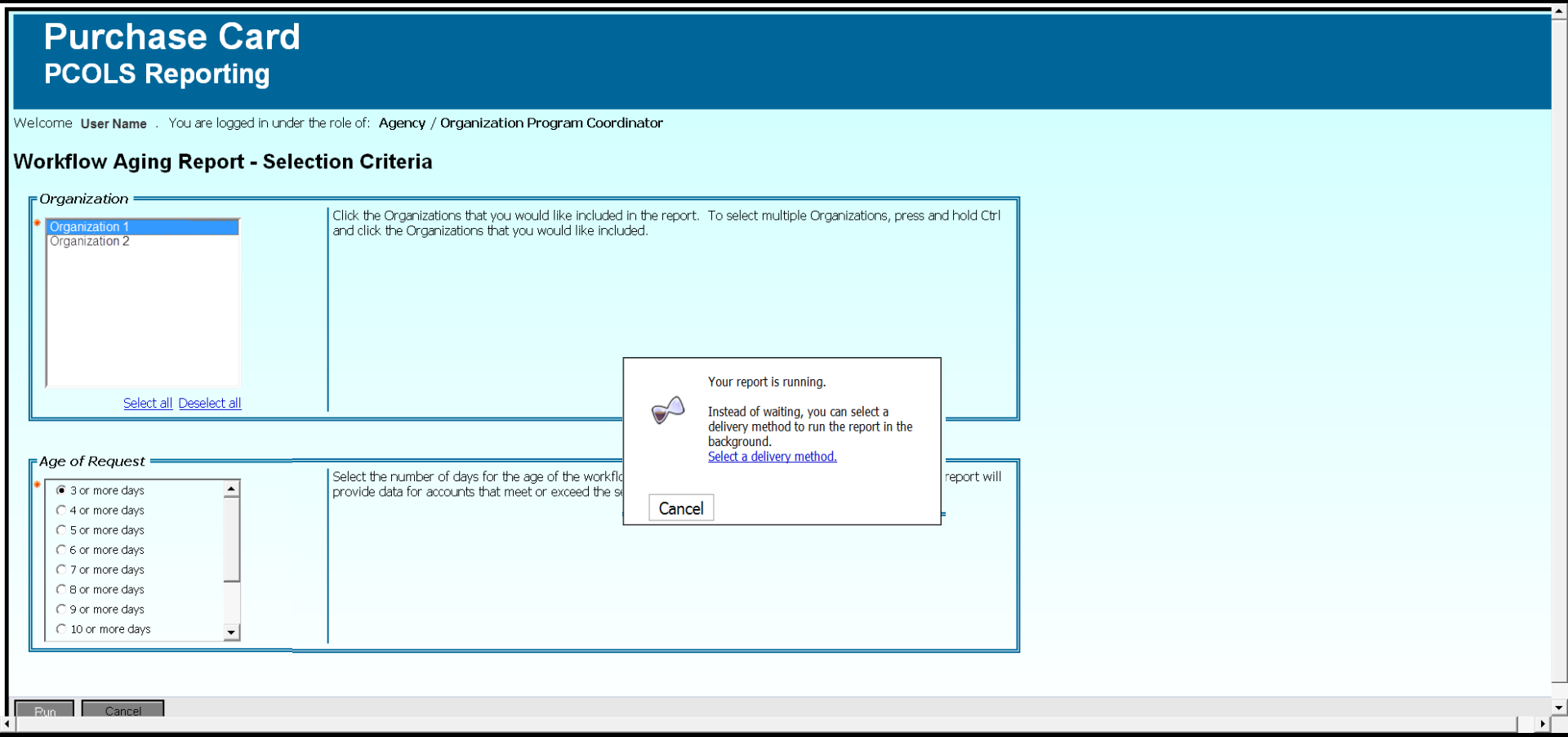
You are required to select the number of days for the age of the workflows that will be included on the report. Select the “3 or more days” radio button.

Workflow Aging Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Workflow Aging Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Age of Request
3 or more days
4 or more days
5 or more days
6 or more days
7 or more days
8 or more days
9 or more days
10 or more days
Select the number of days for the age of the workflow items that you would like included on the report. The report will provide data for accounts that meet or exceed the selected criteria.
Run
Cancel

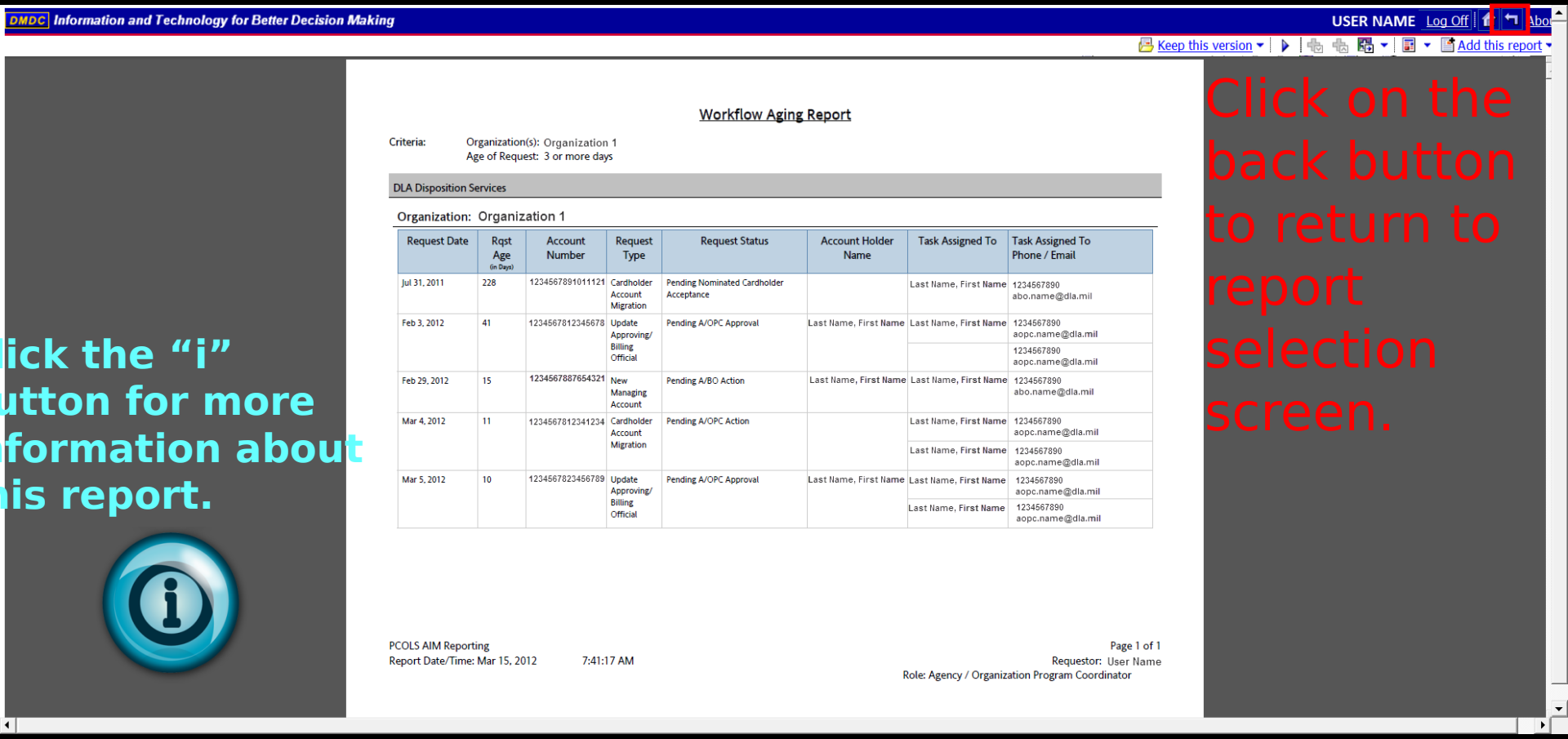
All required criteria has been selected. Click the “Run” button.

Workflow Aging Report


Purchase Card
PCOLS Reporting
Welcome User Name . You are logged in under the role of: Agency / Organization Program Coordinator
Workflow Aging Report - Selection Criteria
Organization
Organization 1
Organization 2
Select all Deselect all
Click the Organizations that you would like included in the report. To select multiple Organizations, press and hold Ctrl and click the Organizations that you would like included.
Your report is running.
Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Age of Request
3 or more days
4 or more days
5 or more days
6 or more days
7 or more days
8 or more days
9 or more days
10 or more days
report will
Run
Cancel

Your report is running. Please wait...

Workflow Aging Report


DMDC Information and Technology for Better Decision Making
USER NAME Log Off
Keep this version
Add this report
ick the "i" utton for more formation about is report.
Click on the back button to return to report selection screen.
Workflow Aging Report
Criteria: Organization(s): Organization 1
Age of Request: 3 or more days
DLA Disposition Services
Organization: Organization 1
Request Date | Rqst Age (in Days) | Account Number | Request Type | Request Status | Account Holder Name | Task Assigned To | Task Assigned To Phone / Email
Jul 31, 2011 | 228 | 1234567891011121 | Cardholder Account Migration | Pending Nominated Cardholder Acceptance | | Last Name, First Name | 1234567890 abo.name@dla.mil
Feb 3, 2012 | 41 | 1234567812345678 | Update Approving/ Billing Official | Pending A/OPC Approval | Last Name, First Name | Last Name, First Name | 1234567890 aopc.name@dla.mil
| | | | | | | | 1234567890 aopc.name@dla.mil
Feb 29, 2012 | 15 | 123456788765432 | New Managing Account | Pending A/BO Action | Last Name, First Name | Last Name, First Name | 1234567890 abo.name@dla.mil
Mar 4, 2012 | 11 | 1234567812341234 | Cardholder Account Migration | Pending A/OPC Action | | Last Name, First Name | 1234567890 aopc.name@dla.mil
| | | | | | | Last Name, First Name | 1234567890 aopc.name@dla.mil
Mar 5, 2012 | 10 | 1234567823456789 | Update Approving/ Billing Official | Pending A/OPC Approval | Last Name, First Name | Last Name, First Name | 1234567890 aopc.name@dla.mil
| | | | | | | Last Name, First Name | 1234567890 aopc.name@dla.mil
PCOLS AIM Reporting
Report Date/Time: Mar 15, 2012 7:41:17 AM
Page 1 of 1
Requestor: User Name
Role: Agency / Organization Program Coordinator

The report has been generated. The report allows users to view the tasks that have been in a workflow longer than the time frame selected. The data includes the user that is currently assigned to the task in AIM.

Workflow Aging Report

The **benefits** of running this report:

- Ability to quickly view all outstanding tasks that need to be completed
- View what user has the task in the workflow

Scenario: The A/OPC runs this report to check on all outstanding workflows. This allows for a quick way for the A/OPC or any higher lever roles to see what user has not acted on their task in AIM. A/OPC has the option to send task reminder emails to these users in AIM.

This concludes the PCOLS 101 Interactive Tutorial:

How to Generate Reports in PCOLS

Reporting

To exit tutorial press ESC on your keyboard